Table IT

User Manual

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Table_IT_US

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[website_url]

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CRMADDON's **Online Help**

Welcome to the online help of CRMADDON

On the following pages you will find all information about the proper use of your addon.
If you still have questions and / or do not find a function, please contact us via our **ticket system**
→ www.crmaddon.com/support

We are always willing to improve and adapt our manuals.

Our motto: We develop according to your suggestions!

See also

Installation
License Wizard
Start the Table IT Application
Using Table IT with Remote Database
Login
Create a new Table
Create a table automatically
Matching Search Configuration
Show on Masterrecord
About the report designer
Calculation
Summary Up
Table Relations
Table View Settings
Configuration
View of the table in ACT!
The toolbar
Worth Knowing

Installation

You can download the setup of your addon here, but first you need to register on our website or login with your current login details on the **'My Account'** page.

www.crmaddon.com/downloads

ATTENTION
ACT! and all other ACT! dependent processes must be closed

You can select whether to **open** or **save** the file.
If you select ***'Save'*** a ZIP file be saved on your computer. This ZIP - file can be saved on a removable disk (USB stick) and then you can install the addon on computers which do not have access to the internet.

Click on the file and then on ***'Run'***

Click on ***'Yes'*** if you want to install the addon

On the following PopUps click on ***'Next'***

Click on ***'Yes'*** if you want to download and install the addon

If the addon was installed completely you will see this PopUp

See also

Welcome
License Wizard
Start the Table IT Application
Using Table IT with Remote Database
Login
Create a new Table
Create a table automatically
Matching Search Configuration
Show on Masterrecord
About the report designer
Calculation
Summary Up
Table Relations
Table View Settings
Configuration
View of the table in ACT!

The toolbar
Worth Knowing

Home > Installation > System Requirements

System Requirements

1 GB Ram (at least 512MB free)
AC! 2008-2012

See also

Installation without Internet

Home > Installation > Installation without Internet

Installation without the Internet

ATTENTION
PLEASE MAKE SURE THAT ON BOTH COMPUTERS THE SAME ACT! VERSIONS HAVE BEEN INSTALLED and that you have not installed any other addon of CRMADDON!

If you want to install the addon on a computer without internet connection, at first you need to follow these steps:

1. download and ***save*** the addon on a computer which has internet access
2. extract the .exe and run it once on this computer
   If you do not have any other CRMADDON addon installed there will be new files created in the directory of the .exe
3. you need to copy the new created files on a USB or removable disk *(depending on the addon there can be 4 .exe!)*
   1. General.exe
   2. DevExpress.exe
   3. CRMADDON's.exe
4. move the USB / removable disk to the PC where you want to install it
5. install each packet in the stated order:
   1. General.exe
   2. DevExpress.exe
   3. CRMADDON's.exe
6. After you installed all packages the addon will run on your computer

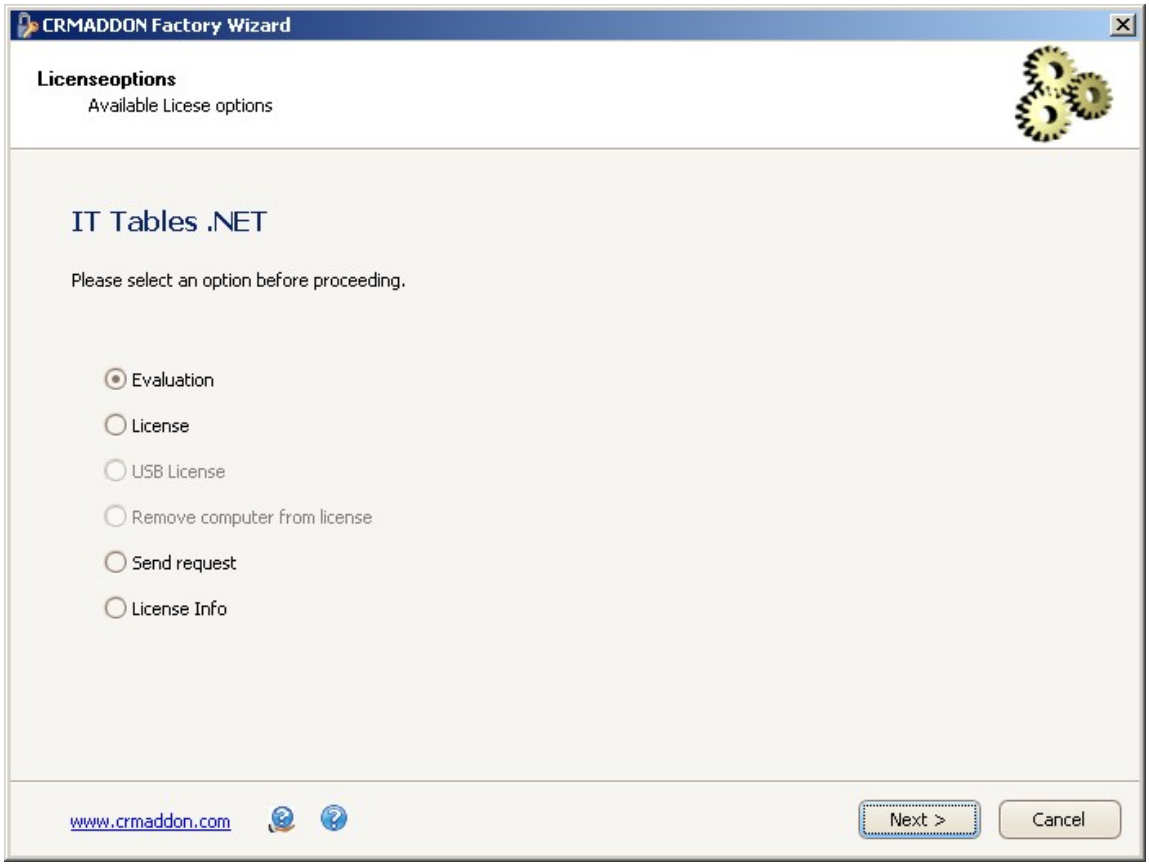
Please note
to license the addon you need internet connection - without internet the registration is not possible

See also

System Requirements

License Wizard

You can easily order a license or start evaluating the software by using built in License Wizard.
It has the following look and opens by clicking **'Wizard for Registration'** button on License tab of Configuration:



See also

Welcome
Installation
Start the Table IT Application
Using Table IT with Remote Database
Login
Create a new Table
Create a table automatically
Matching Search Configuration
Show on Masterrecord
About the report designer
Calculation
Summary Up
Table Relations
Table View Settings
Configuration
View of the table in ACT!
The toolbar
Worth Knowing

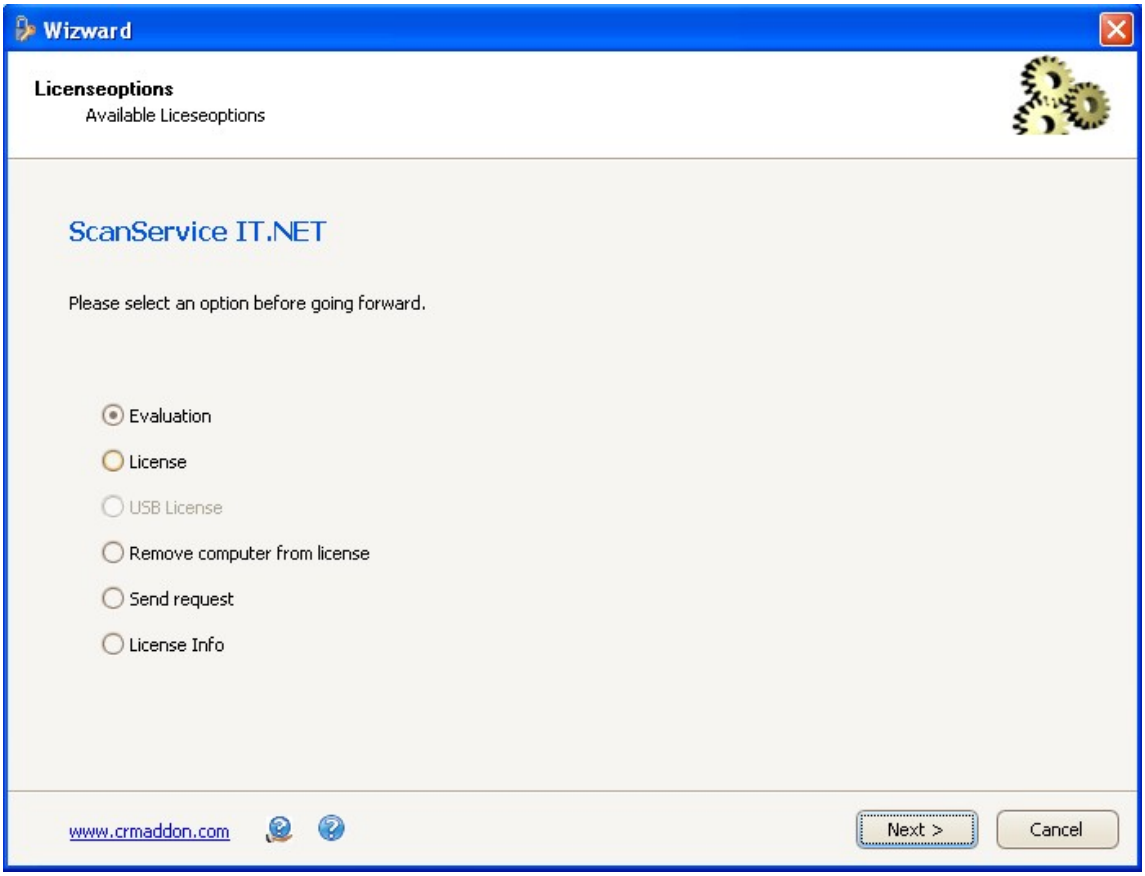
Licensing

When you install a new addon, it is required to be licensed. For testing purposes trial period is offered, so you are welcome to start with evaluation and then purchase a license if you decide to continue using the product.

Almost all addons offered by CRMAddon Factory have 14 days fully functional trial period. The following addons have some limitations:

1. Dial IT - 'Repair Phone Numbers' feature is not available
2. Import IT - Scrambles importing lists, i.e. does not allow to import information exactly as it appears in the source file, allows only 10 records importing. SQL connect is not possible as well
3. Scan IT allows scanning only 5 business cards per run
4. Export IT allows exporting only 10 records per run.

For licensing a convenient license wizard will open. You will need to follow its steps to evaluate or register the product with your license. It has the following look:

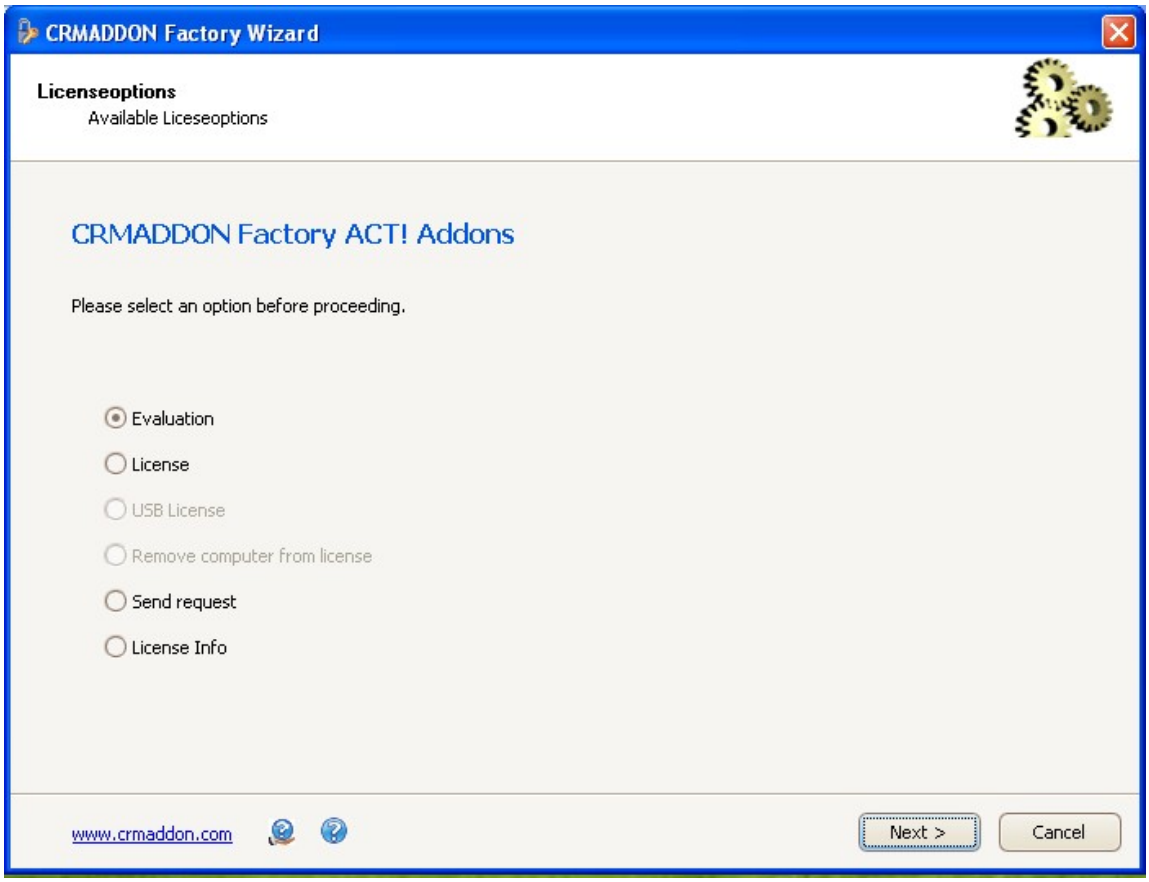


With this wizard you can start evaluation, register your license, remove computer from license, send request to our support team or get information about your license.

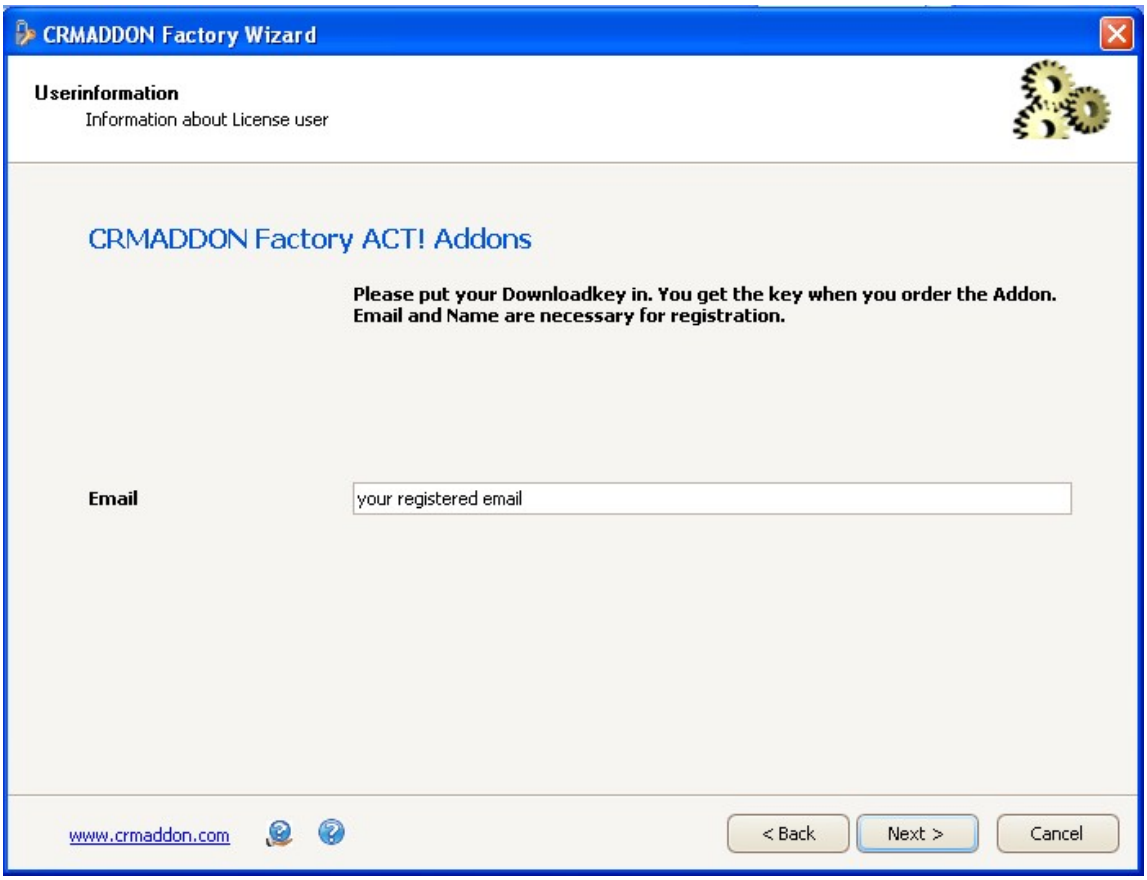
See also

Evaluation

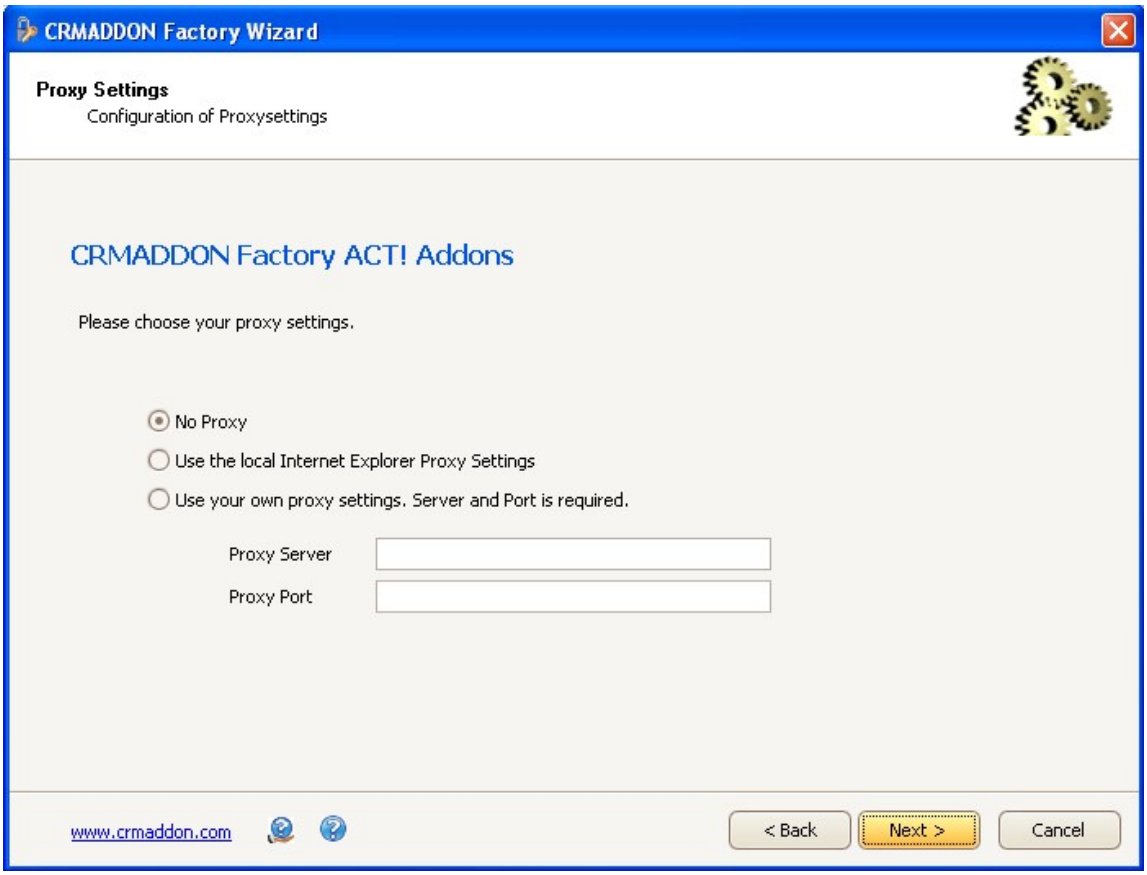
To start free trial period you need to select 'Evaluation' option on the Start Wizard page:



On the next form you will need to provide an email you registered the trial with:

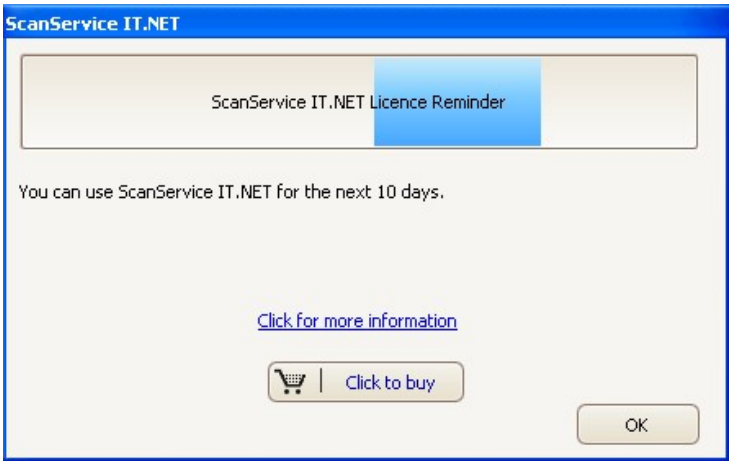


On the next step you will need to specify you connection settings. If you use proxy for connecting to the Internet, then, please add server and port to the corresponding fields. 'No proxy' should be selected if you use direct connection to the Internet.



Then you will need to click **'Finish'** button to exit the Wizard and complete evaluation registration.

Each time you start the addon the program will offer you to purchase a license or to continue using the evaluation:


ScanService IT.NET
ScanService IT.NET Licence Reminder
You can use ScanService IT.NET for the next 10 days.
Click for more information
Click to buy
OK

To proceed with trial just click 'Ok' button. On this window you will see the name of the addon you are using and how many days of trial are left.

If you would like to purchase a license you will need to click **'Click to buy'** button.

If you experience any issues and need our assistance, please click the following button at the bottom of the Wizard to create a support ticket

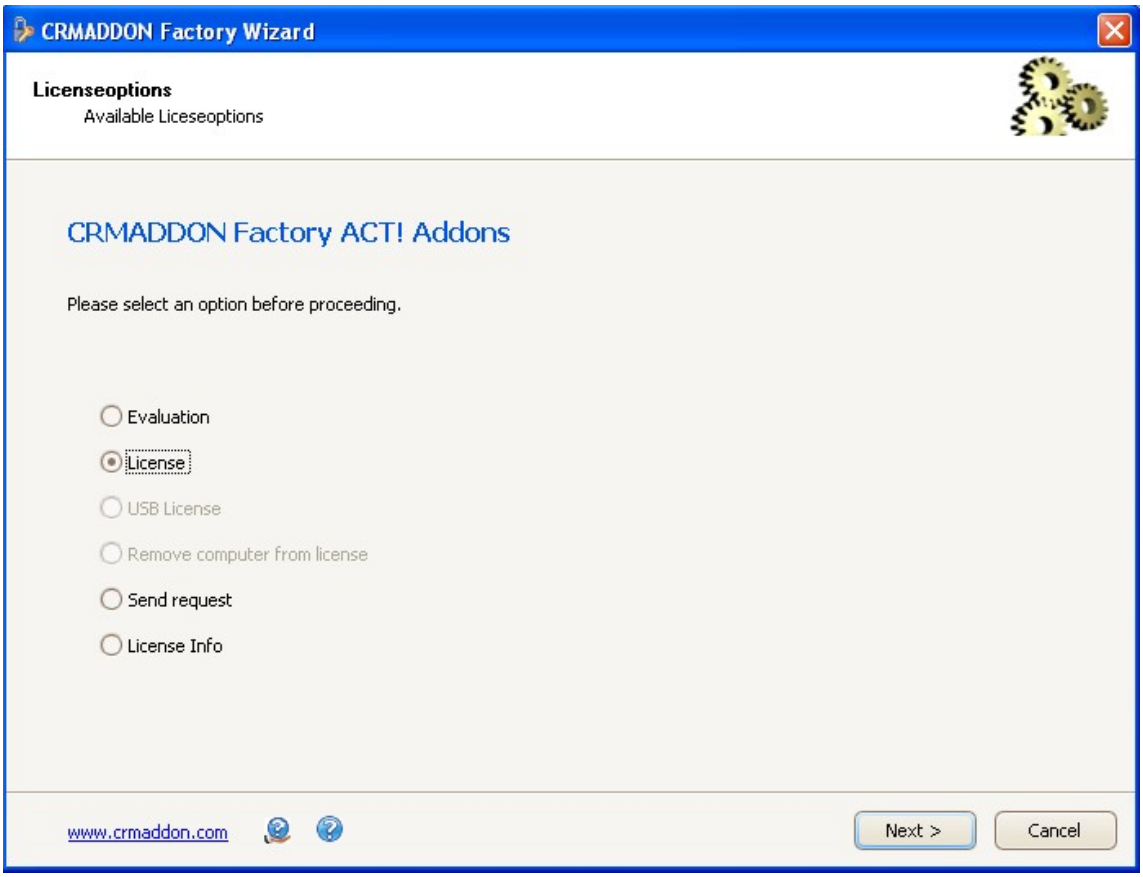
To open our User Manual, please click button at the bottom of the Wizard.

See also:

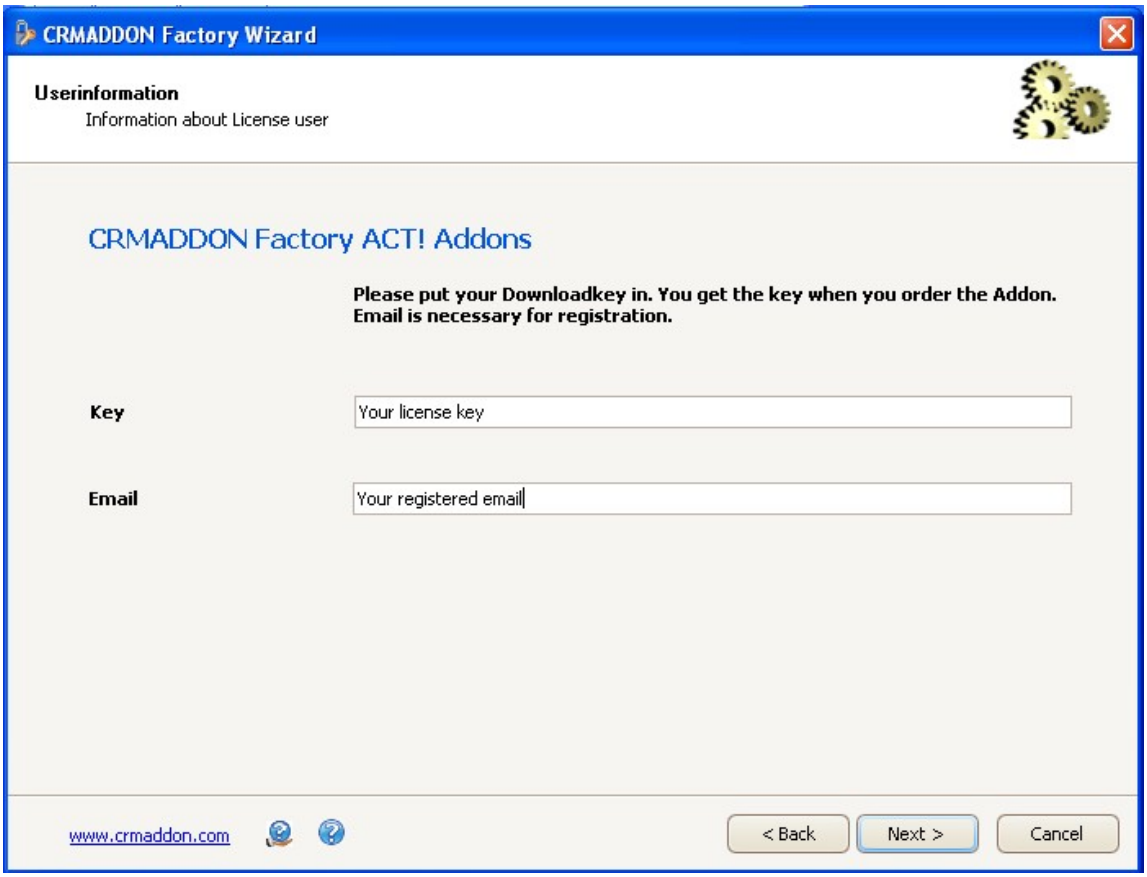
License
Remove computer from license
Send Request
License Info

License

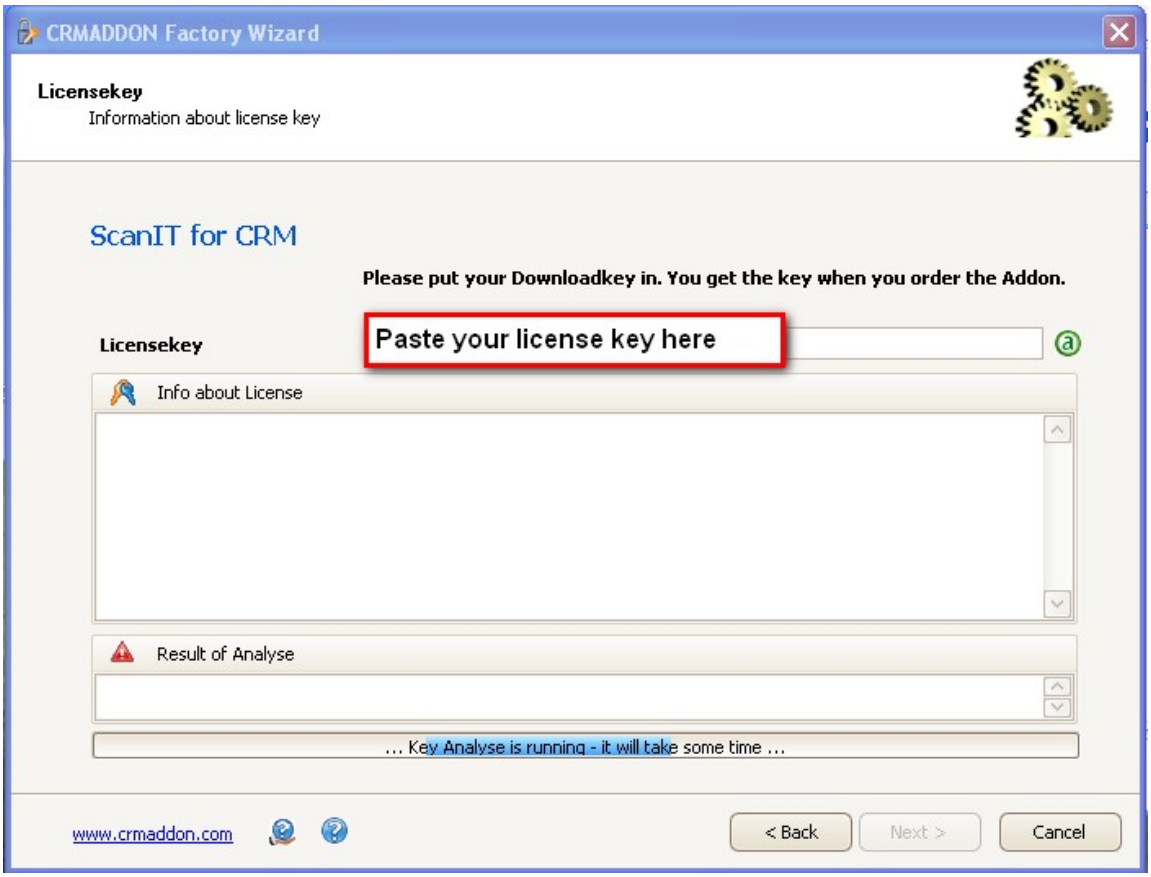
By selecting this option you can license the product you are using. To do this you need to specify the registration key you received from our team. The license is provided per user computer, i.e. single licence is for 1 machine where the software is installed. If you purchase 3 licenses you will receive one license key which should be used for all machines. The system automatically connects to the server and checks your license, e.g. if there are free licenses for your computers or not.



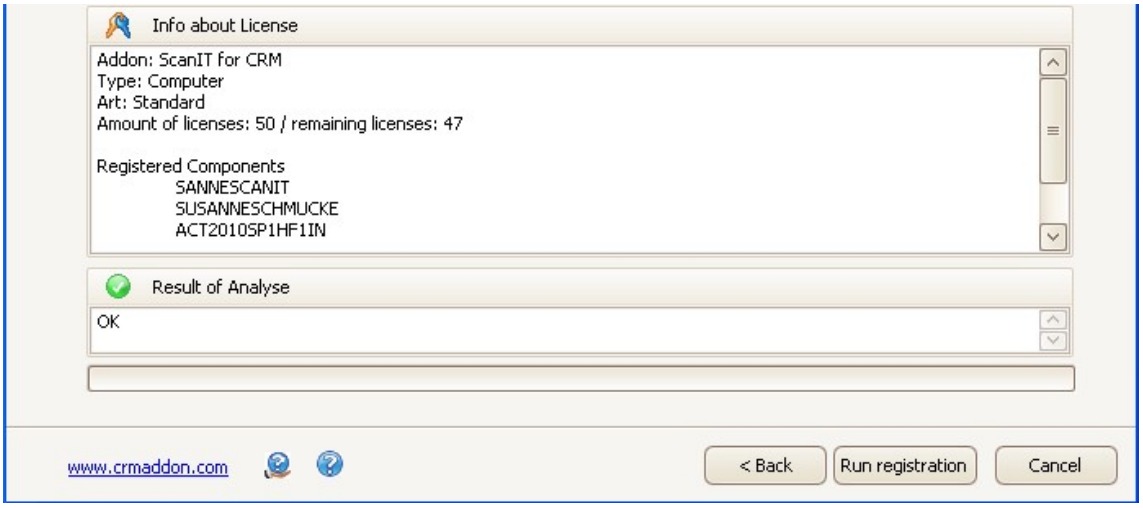
On the next window you will need to specify your license key and email registered in our system:



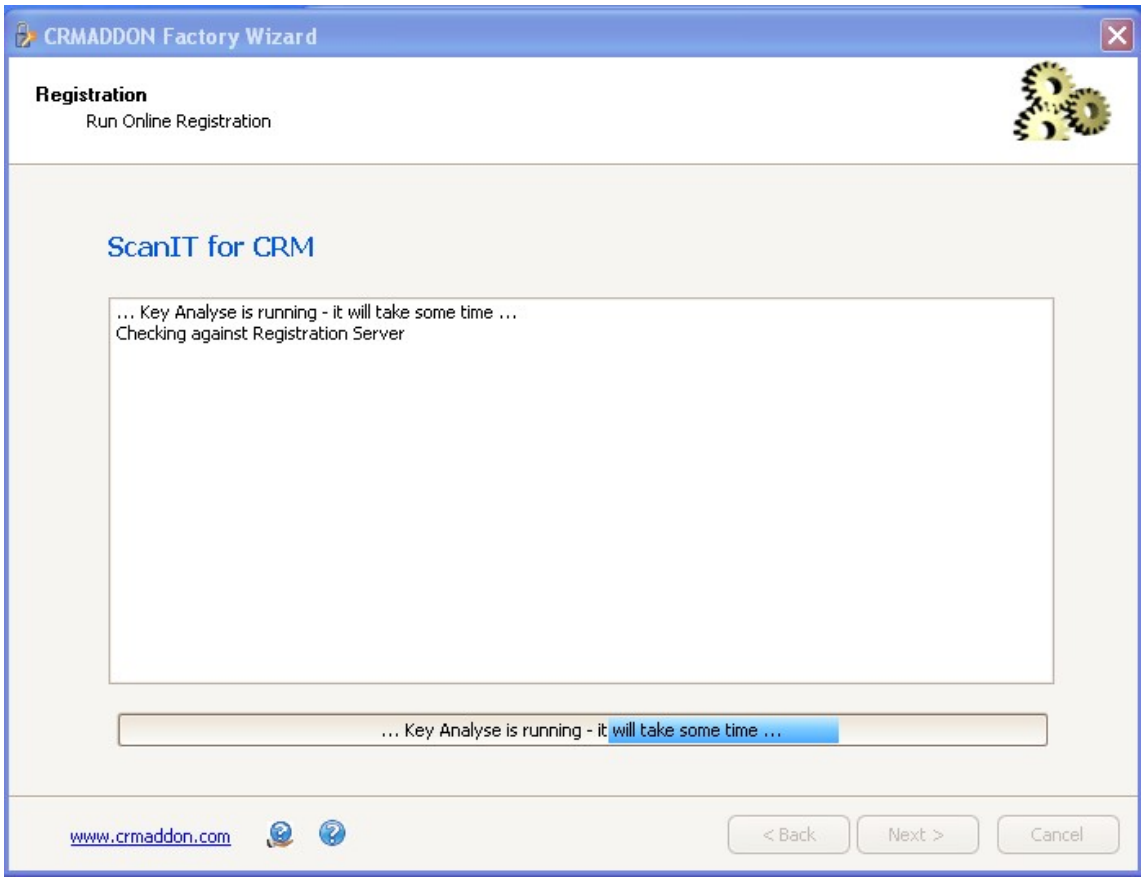
On the next step the system will check if your license key is valid or not, this might take some time, click analyse button to start analyse:


CRMADDON Factory Wizard
Licensekey
Information about license key
ScanIT for CRM
Please put your Downloadkey in. You get the key when you order the Addon.
Licensekey
Paste your license key here
Info about License
Result of Analyse
... Key Analyse is running - it will take some time ...
www.crmaddon.com
< Back
Next >
Cancel

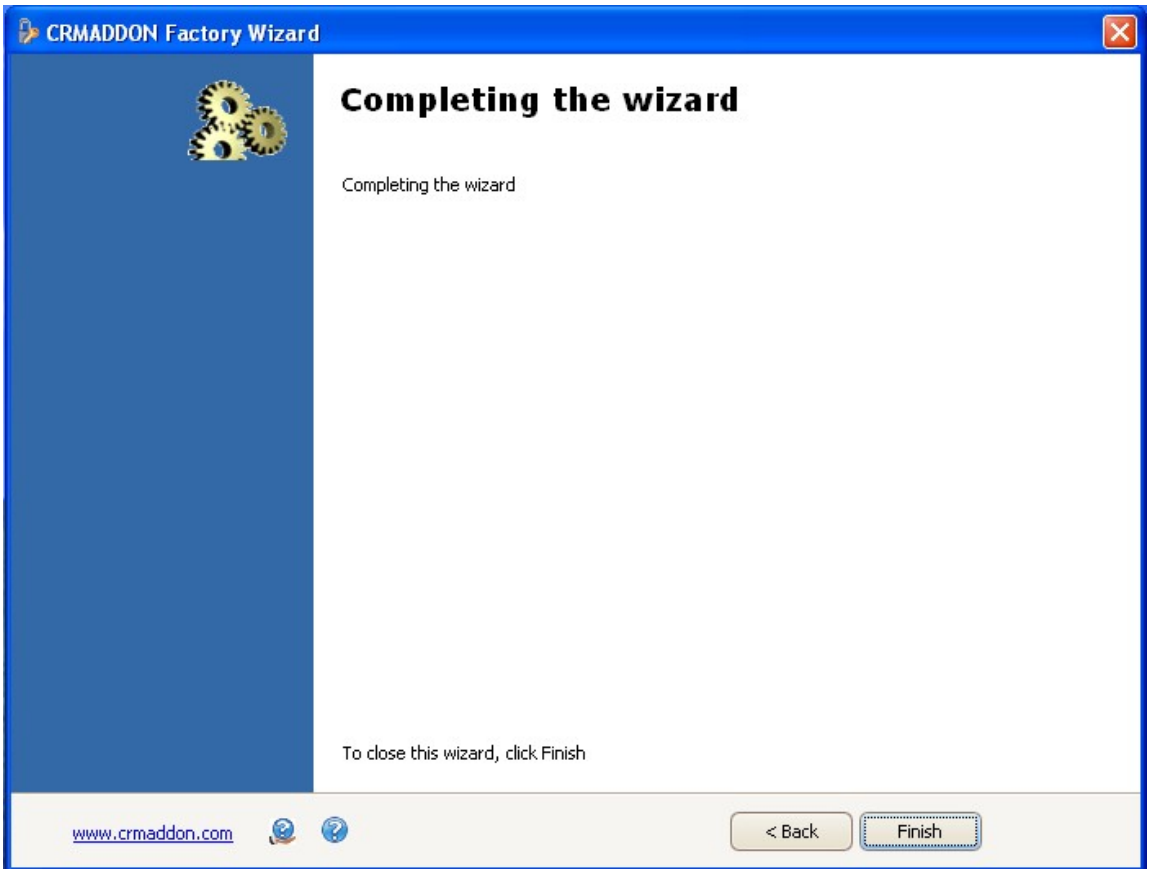
If your license key is not valid you will get a corresponding notification and will return back to the start page of the Wizard.
If the validation is successful the following window will appear:



Now you can click **'Run Registration'** to proceed with license registration.


CRMADDON Factory Wizard
Registration
Run Online Registration
ScanIT for CRM
... Key Analyse is running - it will take some time ...
Checking against Registration Server
... Key Analyse is running - it will take some time ...
www.crmaddon.com
< Back
Next >
Cancel

After registration completing you need to click **'Next'** to proceed further:



Click **'Finish'** button to finish licensing and exit the Wizard.

If you experience any issues and need our assistance, please click the following button at the bottom of the Wizard to create a support ticket

To open our User Manual, please click button at the bottom of the Wizard.

See also:

- Evaluation
- Remove computer from license
- Send Request
- License Info

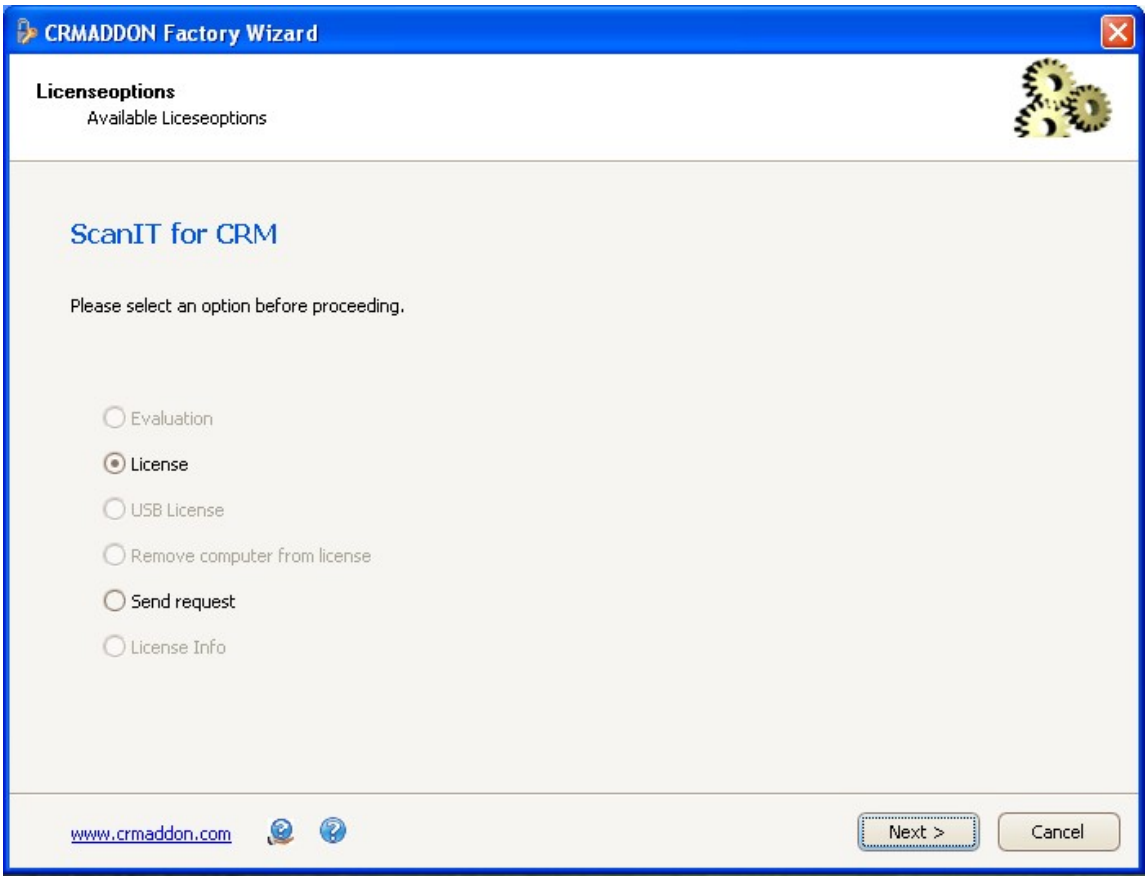
Add Comment

Update license

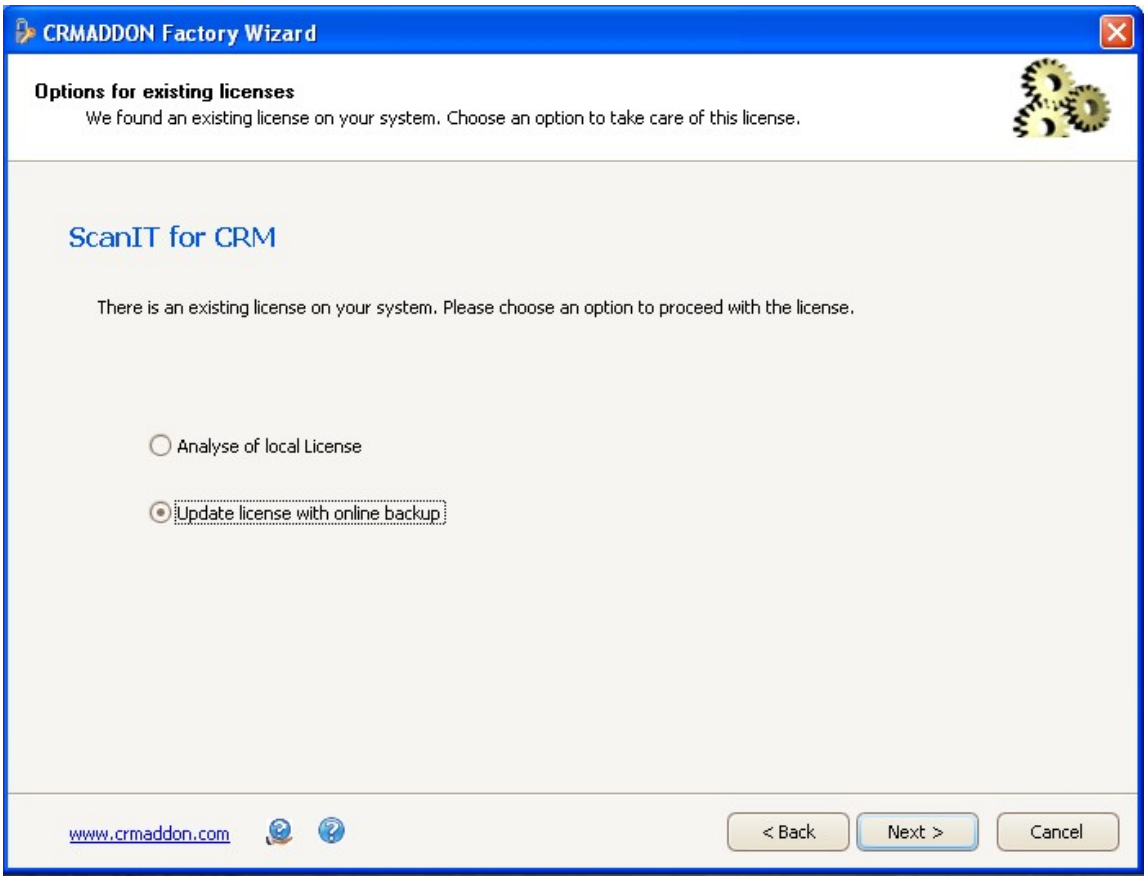
To update your license you need to open **'License and support'** window in your addon and

follow License tab there. On this tab you need to click **'Wizard for Registration'** button

. This will start licensing Wizard, where you can select **'License'** option to proceed with updating:



On the next window you will need to select whether you would like to analyse your current license or update the license with online backup.


CRMADDON Factory Wizard
Options for existing licenses
We found an existing license on your system. Choose an option to take care of this license.
ScanIT for CRM
There is an existing license on your system. Please choose an option to proceed with the license.
Analyse of local License
Update license with online backup
www.crmaddon.com
< Back
Next >
Cancel

If you select **'Analyse of local license'** you will need to click 'Analyse button' on the opened window to get details about your current license. To proceed with updating you will need to select **'Update license with online backup'**. The further steps will be the same as when you register for the first time. Please find detailed instructions on the **'License'** page.

If you experience any issues and need our assistance, please click the following button at the bottom of the Wizard to create a support ticket

To open our User Manual, please click button at the bottom of the Wizard.

See also:

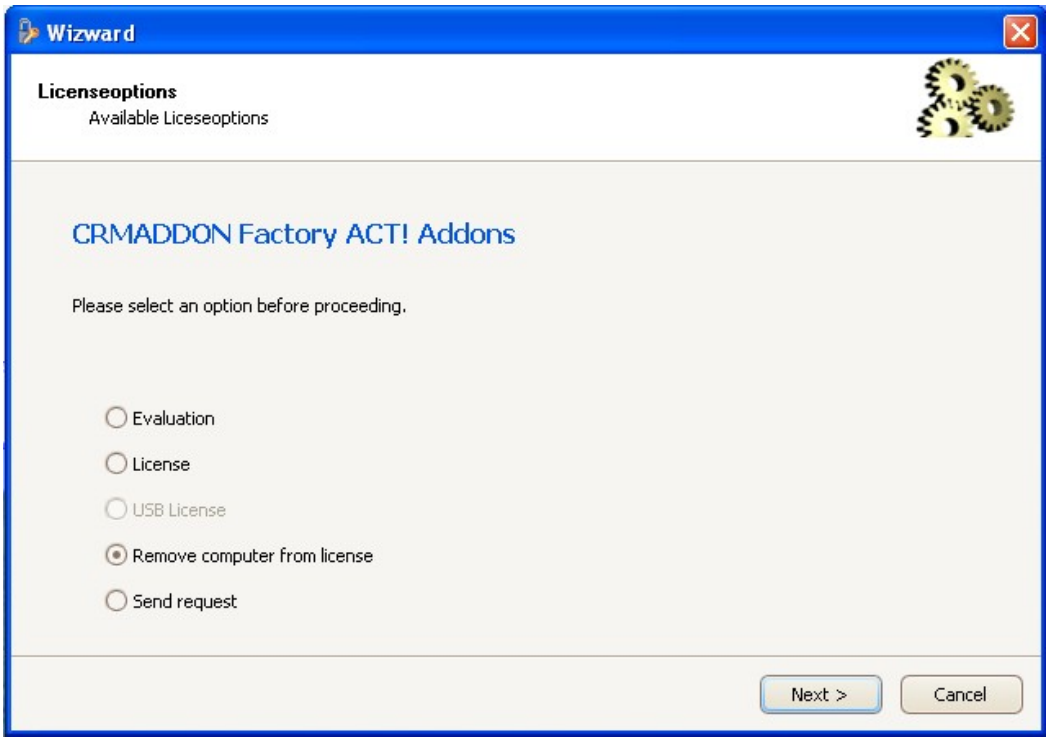
Remove computer from license

This option allows moving the license to another machine. It is possible to change computers only twice then it will not be possible to reset a license. For example if you have a single machine license you can change the computer twice. In case you need to do this more times you will need to create a ticket for our support team.

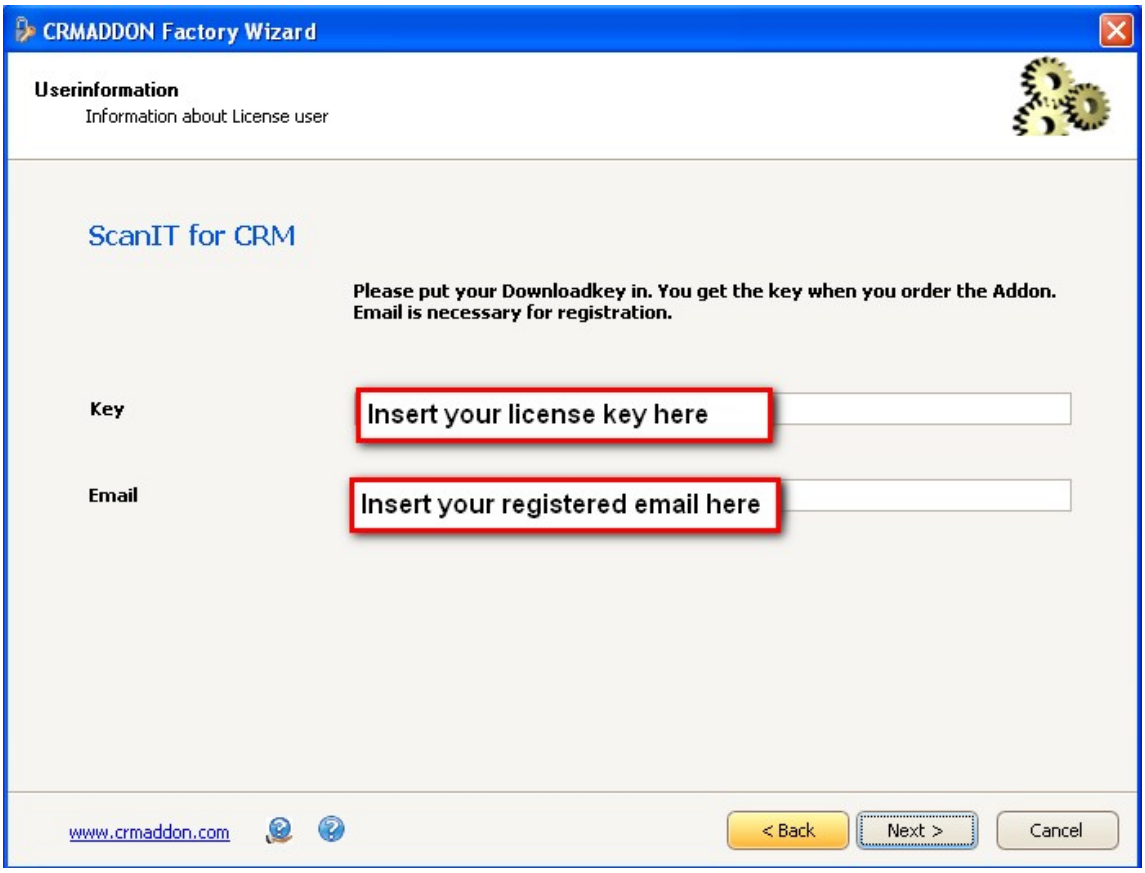
To remove the computer you need to click **'License and support'** button License and support and

then select **Wizard for Registration** on the License tab:

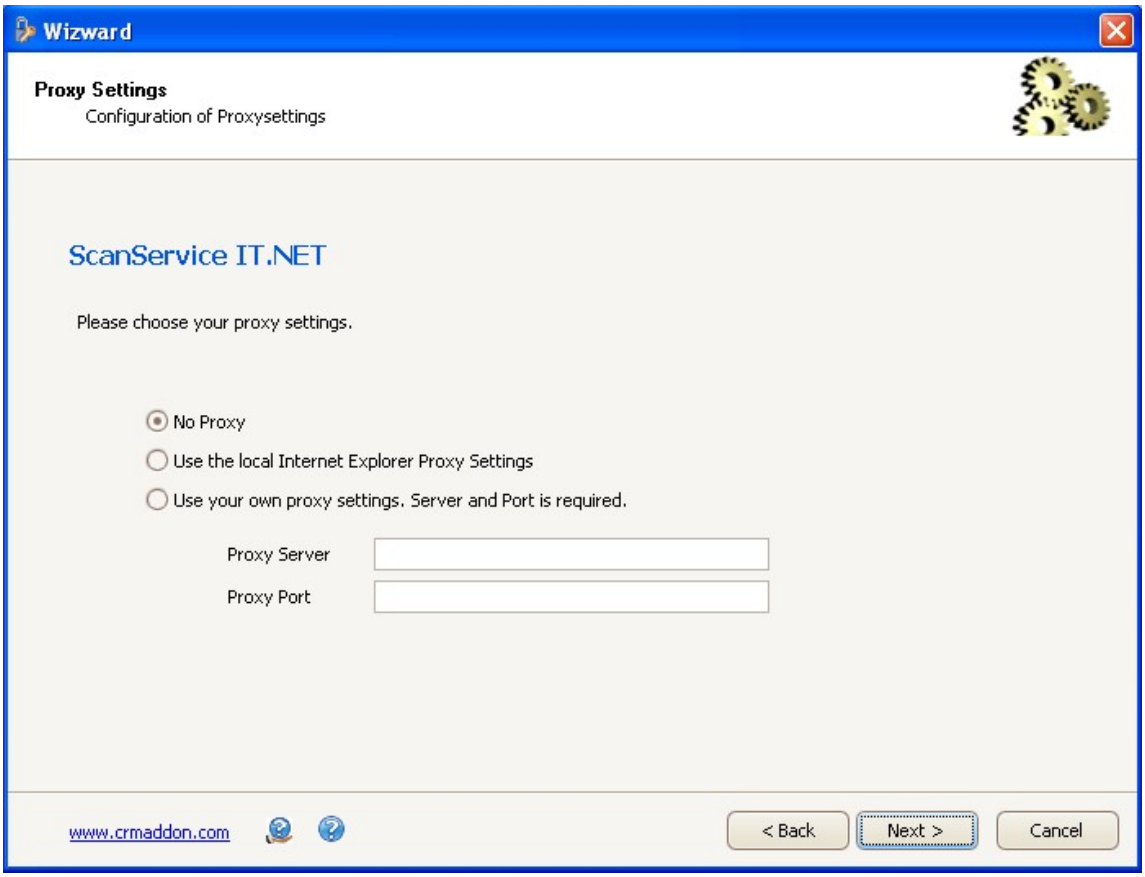
On the opened window you will need to select **'Remove computer from license'** option.



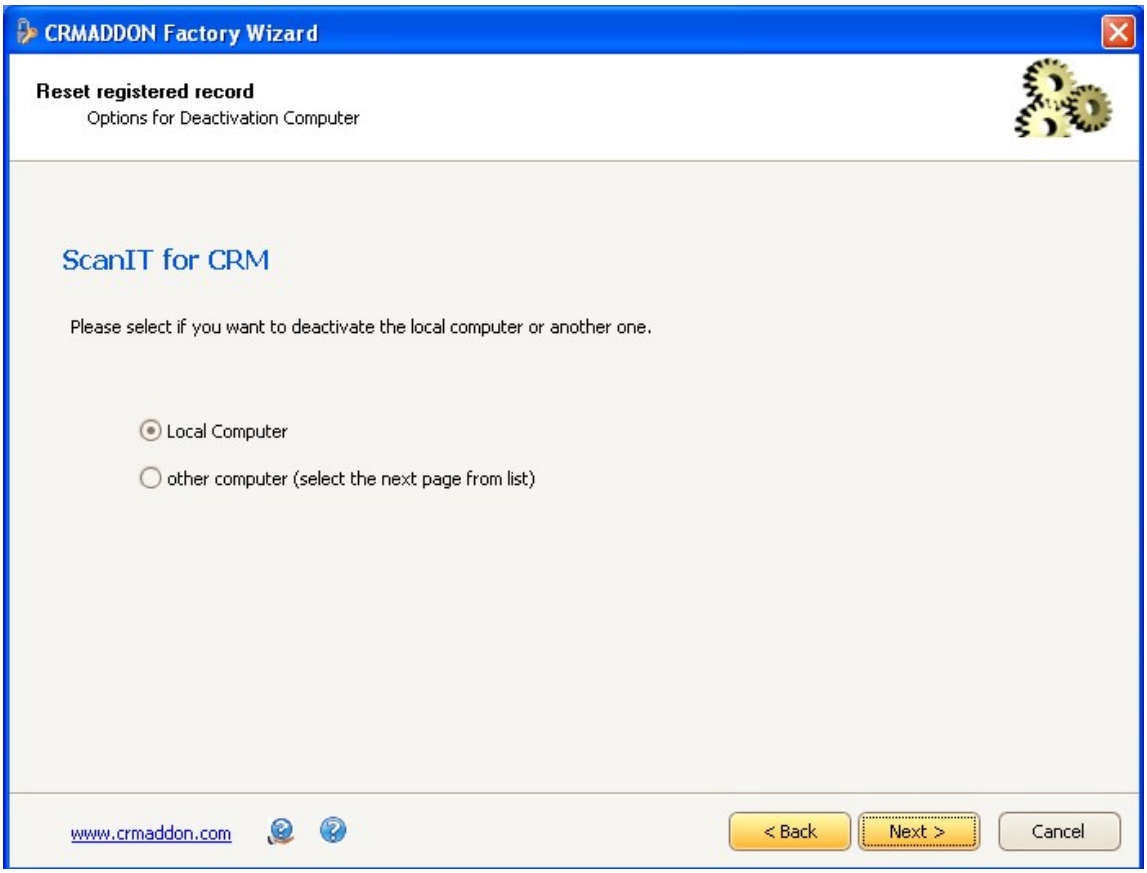
Then you will need to provide your license information and proceed by clicking **'Next'**.



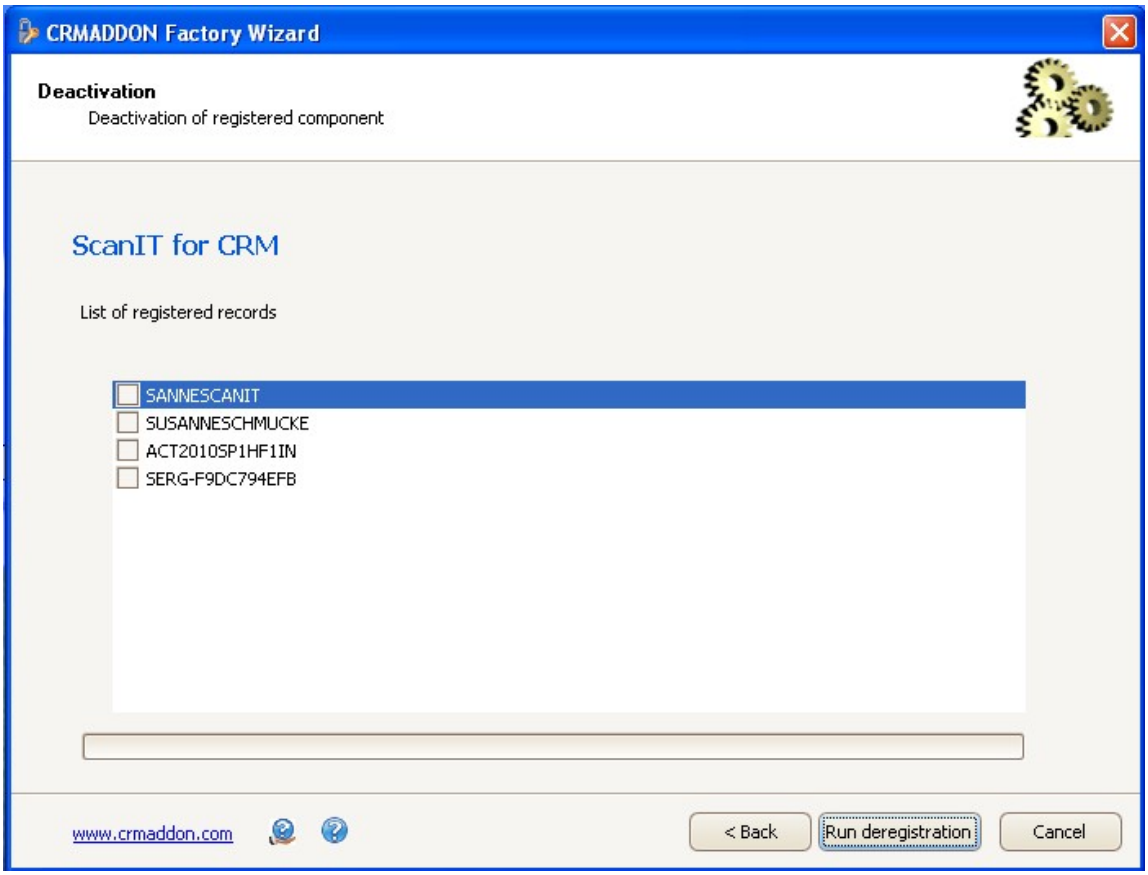
On this window you need to select connection options you have. If you have direct connection to the Internet, then select **'No proxy'** option:



On the next window, please select an option you would like to proceed with: whether you would like to deactivate a local computer or select another machine from the list:


CRMADDON Factory Wizard
Reset registered record
Options for Deactivation Computer
ScanIT for CRM
Please select if you want to deactivate the local computer or another one.
Local Computer
other computer (select the next page from list)
www.crmaddon.com
< Back
Next >
Cancel

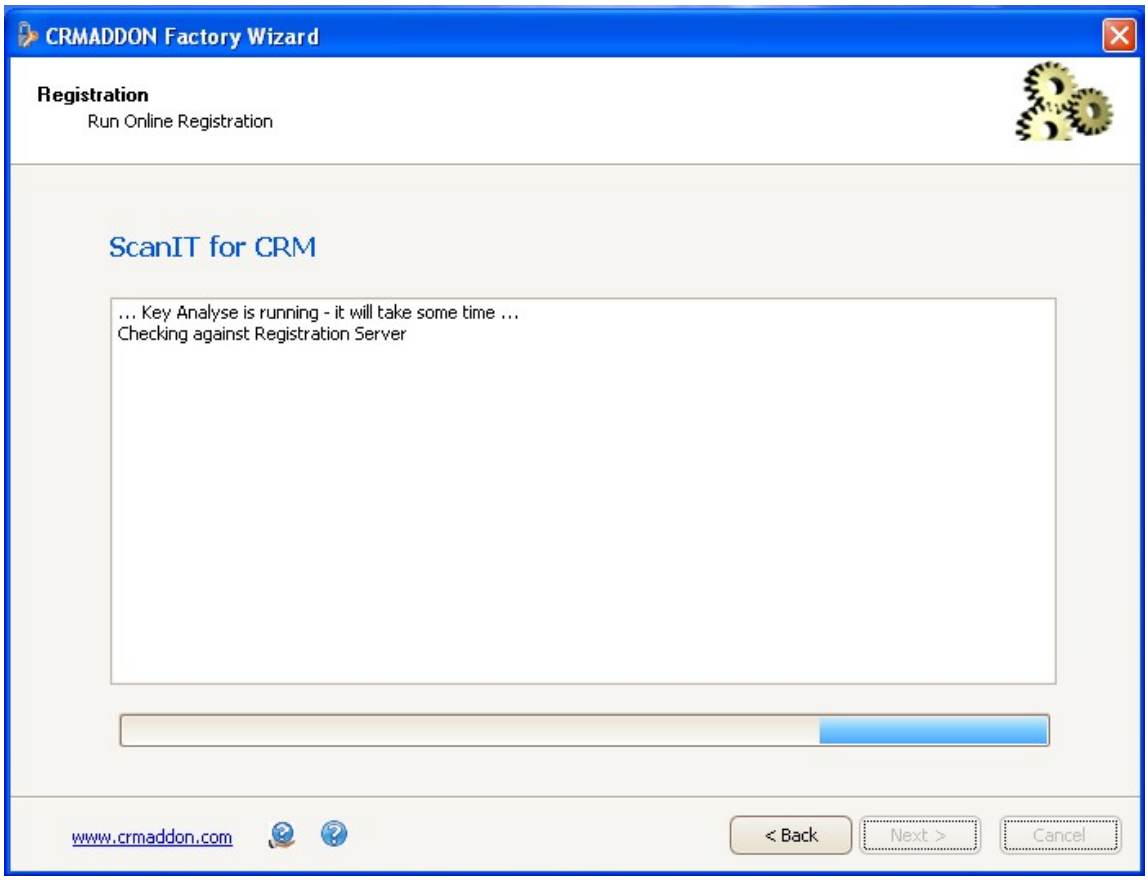
If you need to deactivate some other machine, please select **'Other computer'** option, the following window will open:



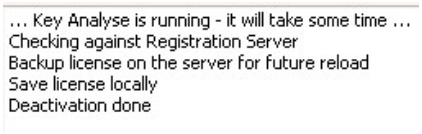
Here you can select the computer you would like to deactivate, click **'Run deregistration'** button to proceed further.

If you select **'Local Computer'** option, the system will ask you to confirm deactivation:

Click **'Yes'** to proceed with deactivation:



Once the system finishes license key checking, the following text will appear notifying that the deactivation was completed:


... Key Analyse is running - it will take some time ...
Checking against Registration Server
Backup license on the server for future reload
Save license locally
Deactivation done

Click **'Next'** button to proceed and then **'Finish'** to close the Wizard.

If you experience any issues and need our assistance, please click the following button at the bottom of the Wizard to create a support ticket

To open our User Manual, please click button at the bottom of the Wizard.

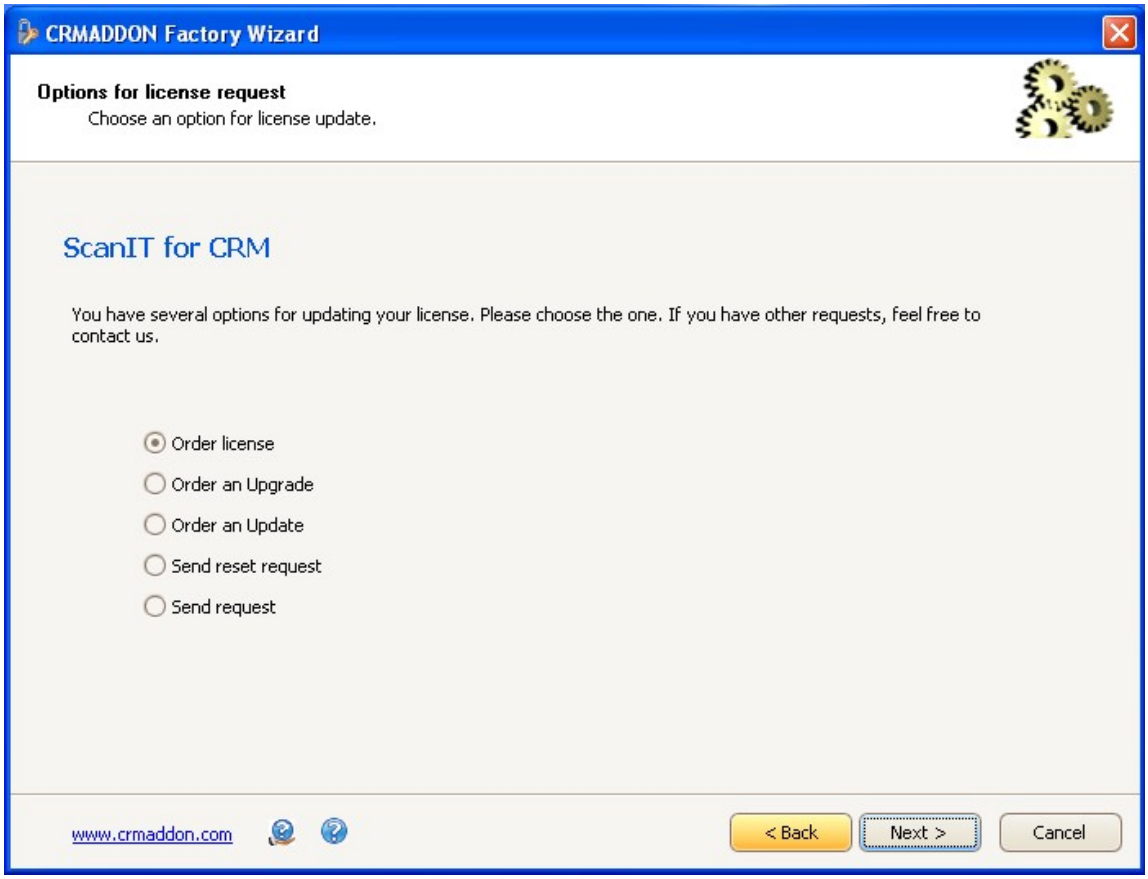
See also:

Evaluation
License
Send Request
License Info

Home > License Wizard > Licensing > Send Request

Send Request

Use this option if you would like to send us a request concerning upgrading your ACT! version, ordering license, adding more computers to the license or resetting a computer from license:


CRMADDON Factory Wizard
Options for license request
Choose an option for license update.
ScanIT for CRM
You have several options for updating your license. Please choose the one. If you have other requests, feel free to contact us.
Order license
Order an Upgrade
Order an Update
Send reset request
Send request
www.crmaddon.com
< Back
Next >
Cancel

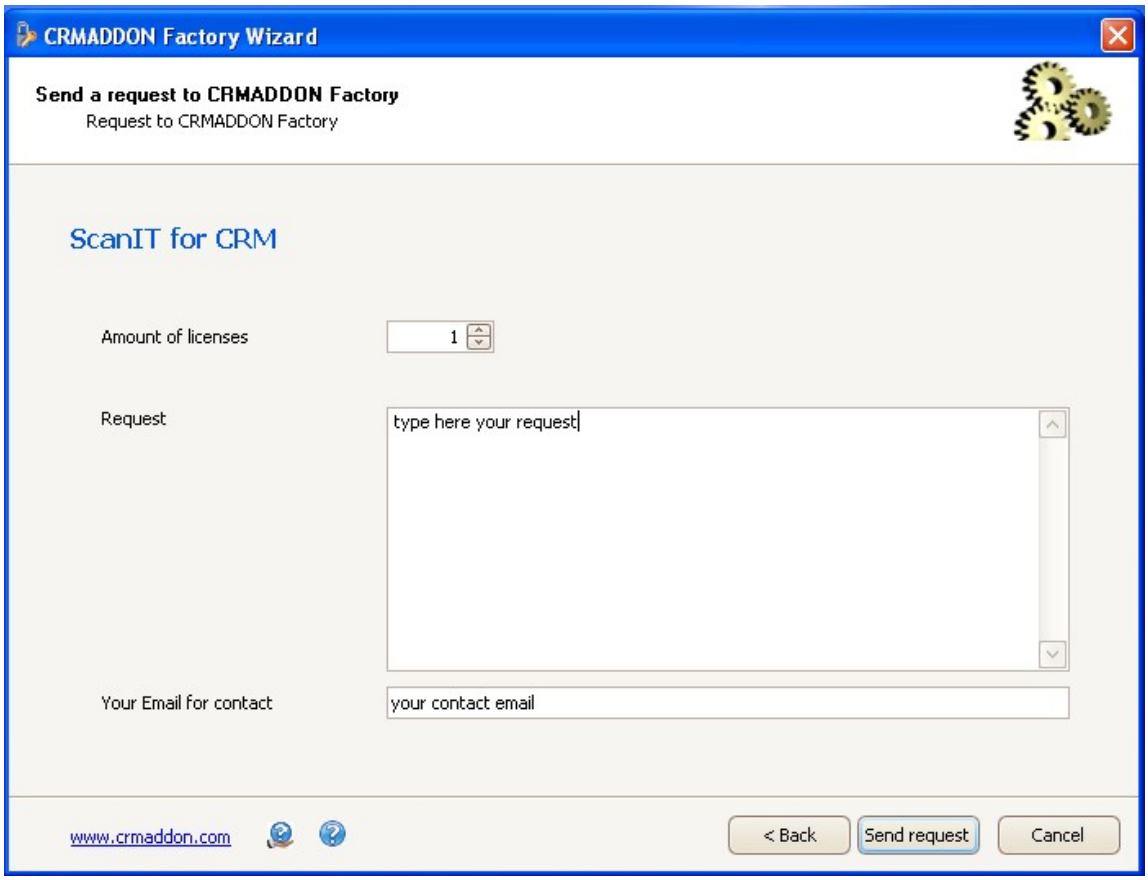
See also:

Evaluation
License
Remove computer from license
License Info

Home > License Wizard > Licensing > Send Request > Order license

Order License

Select this option if you would like to send us a request for license ordering. The following window will open:



On this window you will need to specify the amount of licenses you would like to order, type your request and provide your contact email.

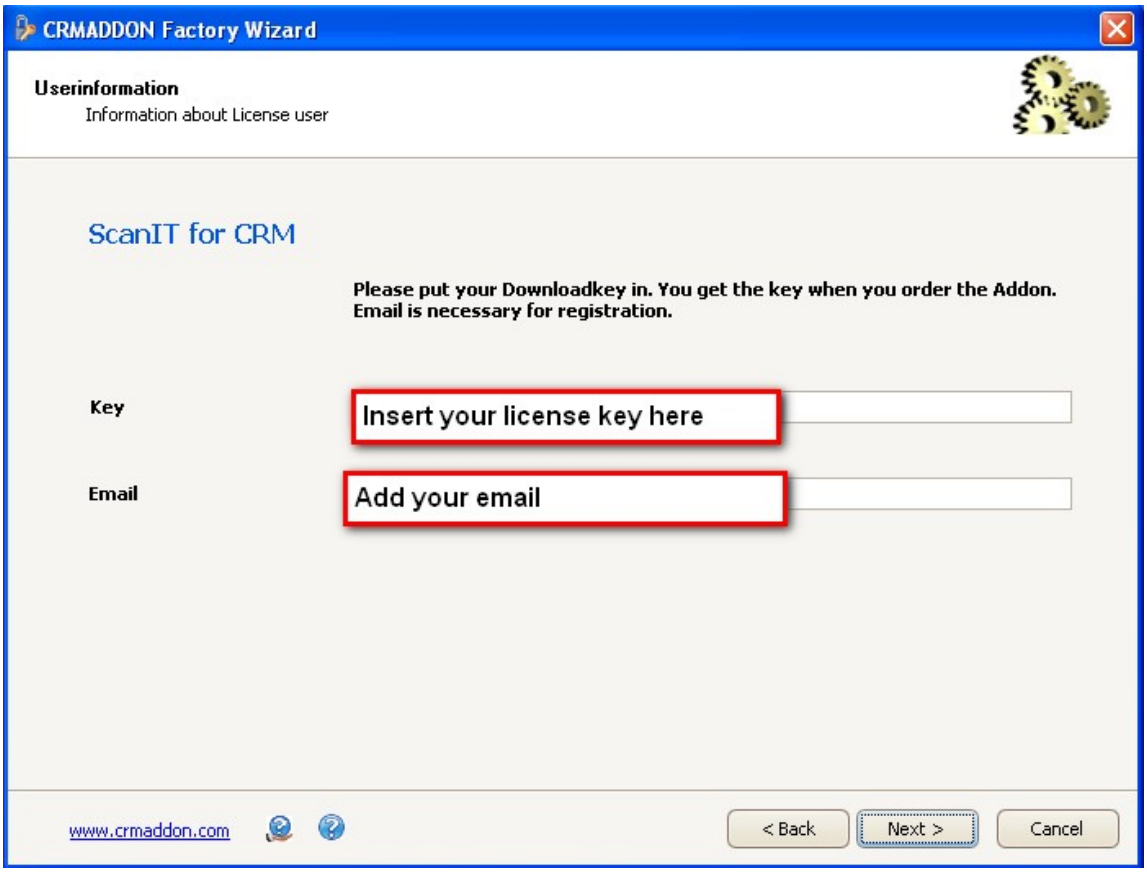
See also:

Order an Upgrade
Order an Update
Send Reset Request
Send Request

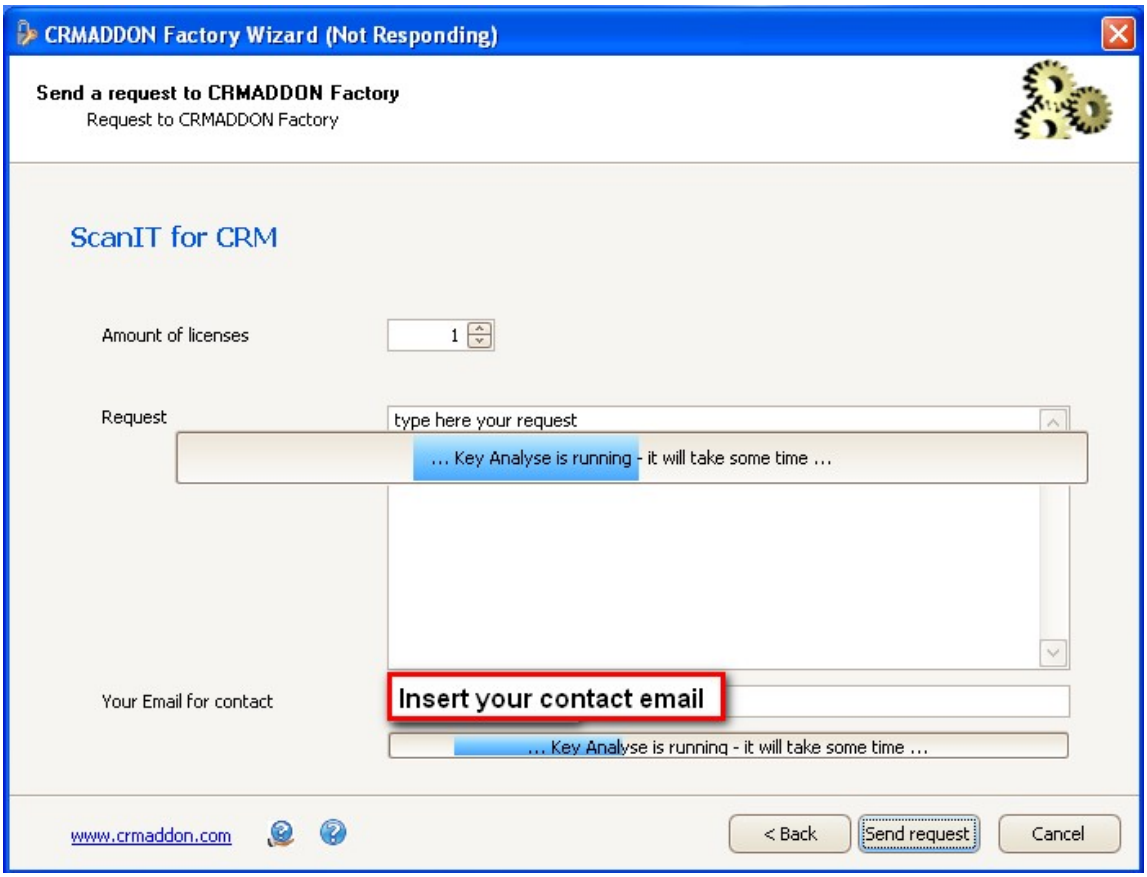
Order an Upgrade

Here you can order an upgrade of your ACT! version.
If you do not change your ACT! version and would like to get a software upgrade within the same version release, for example upgrade 2.3 version to 2.6. version, this will be done for free. However, if you would like to upgrade from 2.x.x version to 3.x.x version then you will need to purchase an upgrade. You will get the upgrade already starting at as low as 10% of the addon license cost. The support for the latest version is provided for free. In case you have an old version, you will need to purchase support units or upgrade to the latest version.

The following window will open after you select 'Order Upgrade' option:



Here you will need to provide your license key and email you are registered with in our system. To proceed further just click 'Next' button.


CRMADDON Factory Wizard (Not Responding)
Send a request to CRMADDON Factory
Request to CRMADDON Factory
ScanIT for CRM
Amount of licenses
1
Request
type here your request
... Key Analyse is running - it will take some time ...
Your Email for contact
Insert your contact email
... Key Analyse is running - it will take some time ...
www.crmaddon.com
< Back
Send request
Cancel

Here you will need to specify the amount of licenses, type your request and provide contact email, where you would like our support team to send you a reply. Then click **'Send request'** button to submit your request. To exit the Wizard just click **'Finish'** button on the next window.

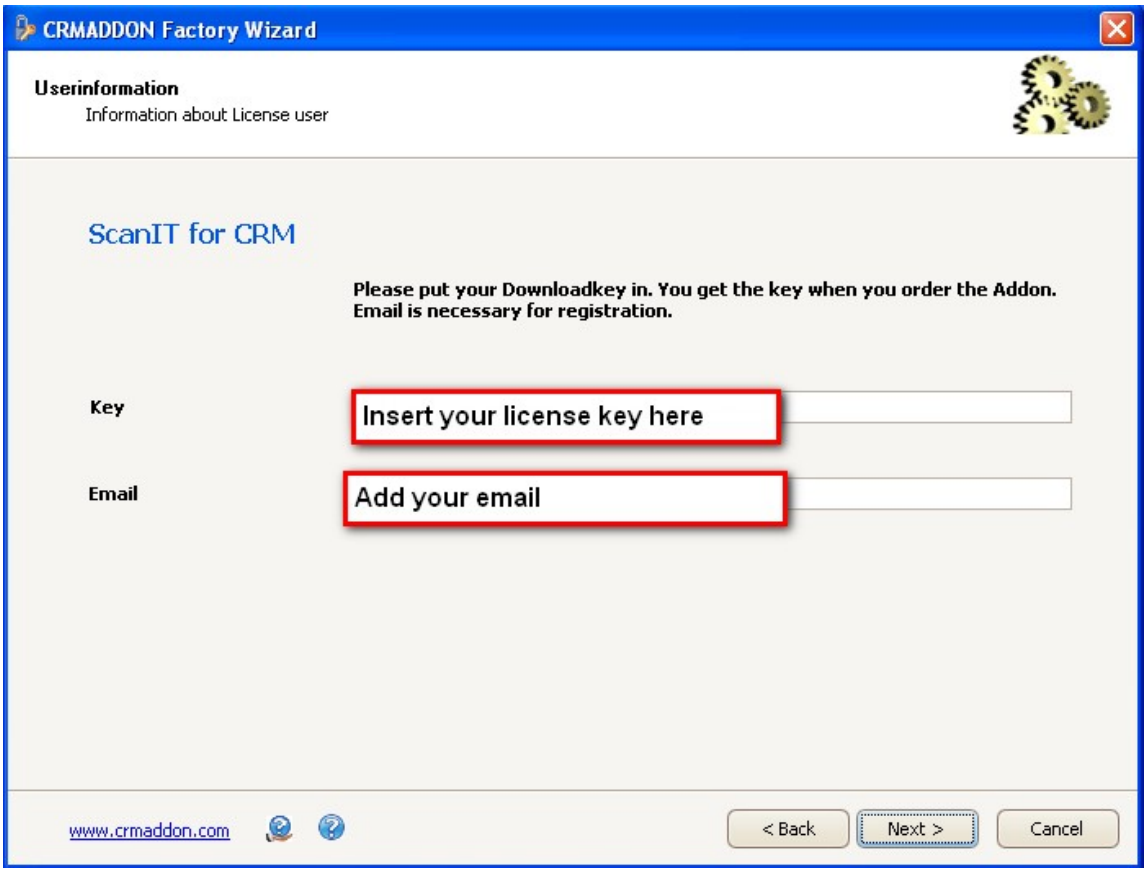
See also

Order license
Order an Update
Send Reset Request
Send Request

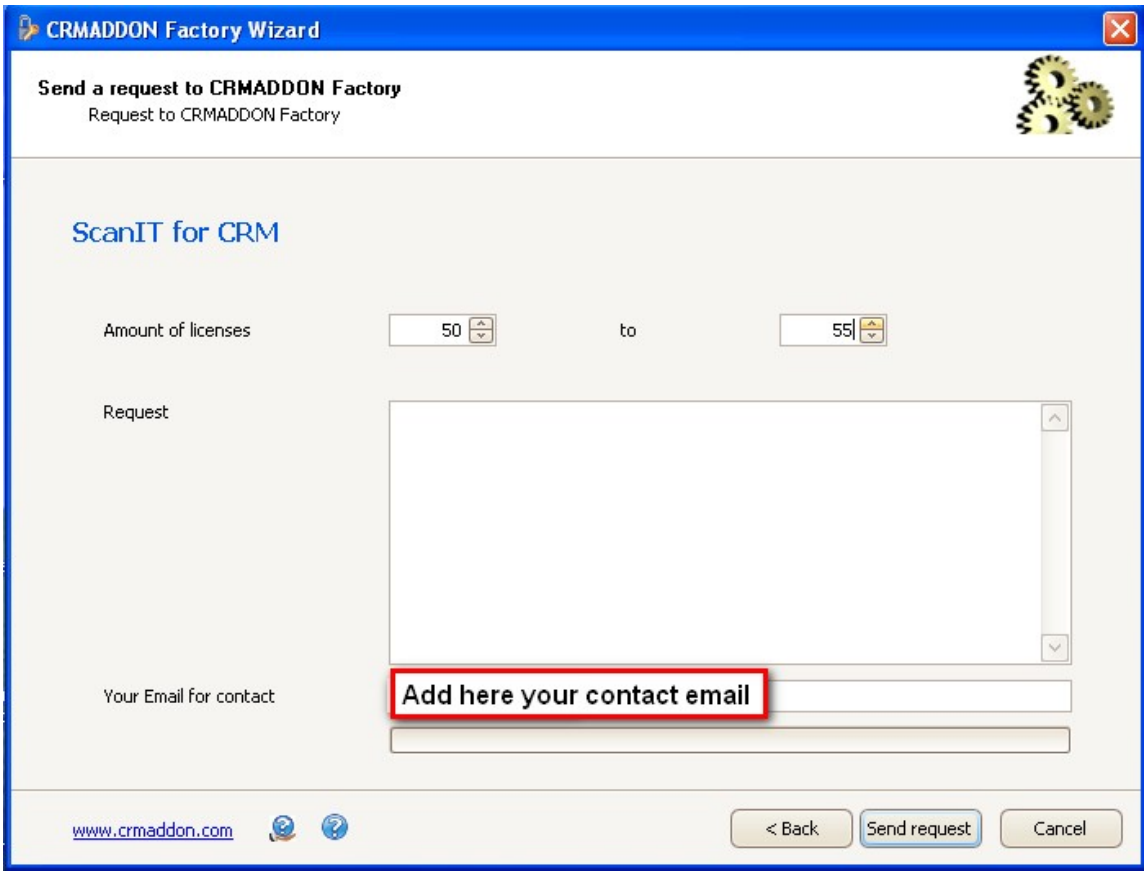
Home > License Wizard > Licensing > Send Request > Order an Update

Order an Update

Select this option if you would like to purchase more licenses of the addon.
On the following window specify your licence key and registered in our system email:



Specify here the number of licenses you would like to upgrade to, type your request and provide an email you would like to get a reply to.



To proceed click **'Send Request'** button and on the next window click **'Finish'** to exit the Wizard.

See also

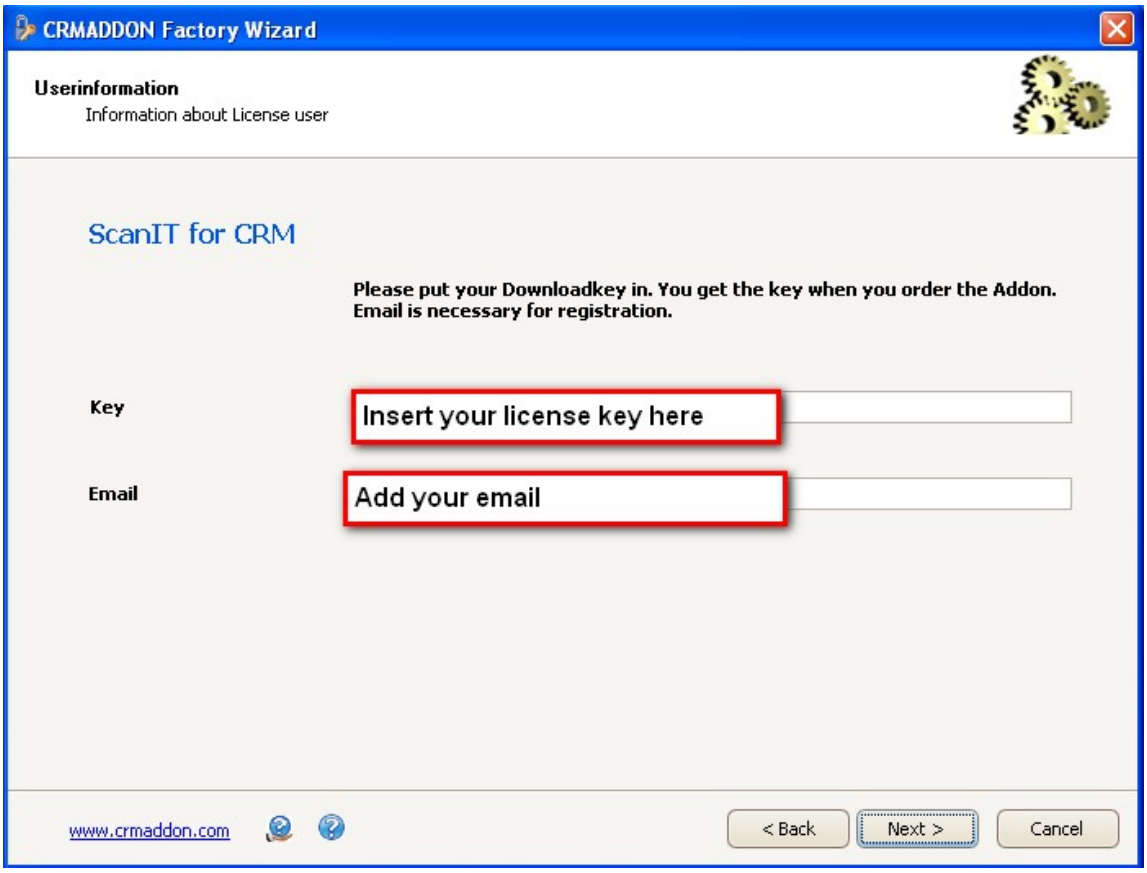
Order license
Order an Upgrade
Send Reset Request
Send Request

Home > License Wizard > Licensing > Send Request > Send Reset Request

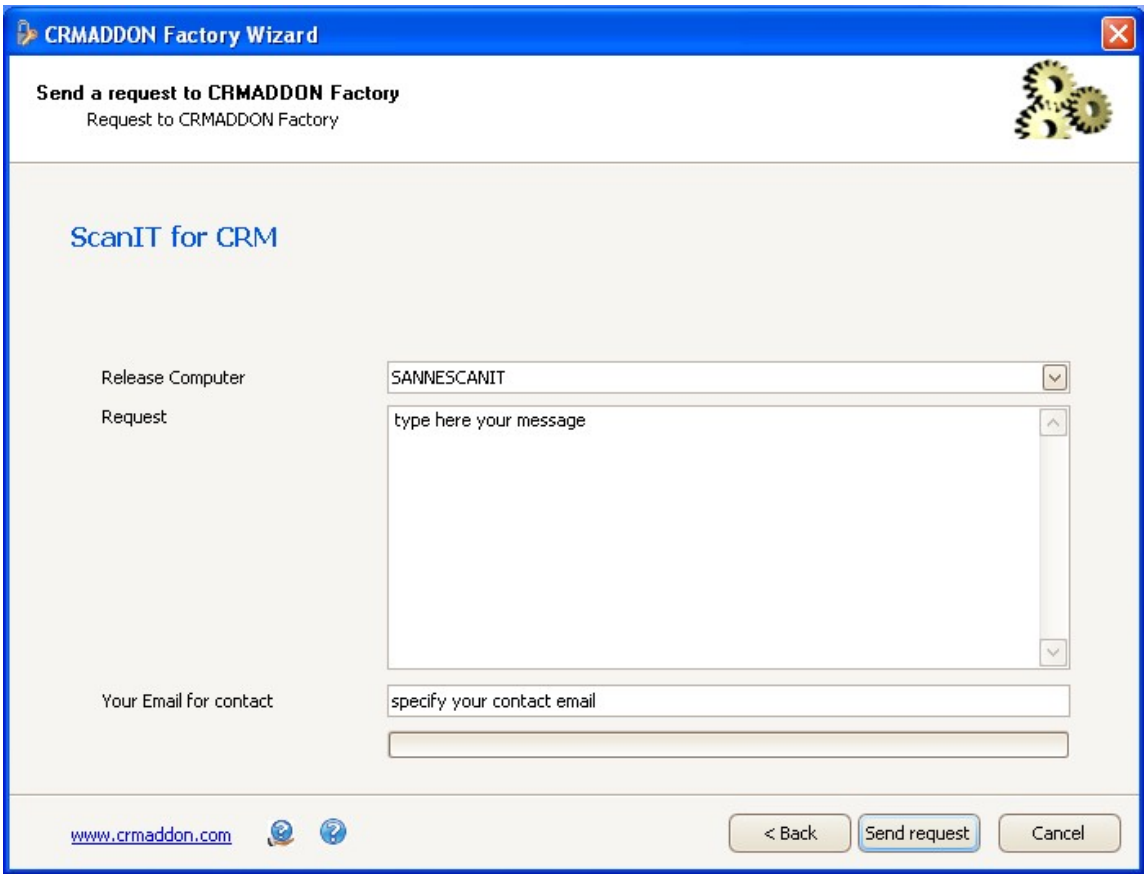
Send Reset Request

If you have already removed computers from licensing 2 times, then you will need to send us a reset request to reset your machine from licensing. You can do this by selecting '[Send reset request](#) ' option.

On the following window you will need to specify your license key and registered in our system email:



On the next window you will need to select a computer you would like to release from the license from the drop down list. type in your request and add contact email.



Press **'Send Request'** button to submit your request.

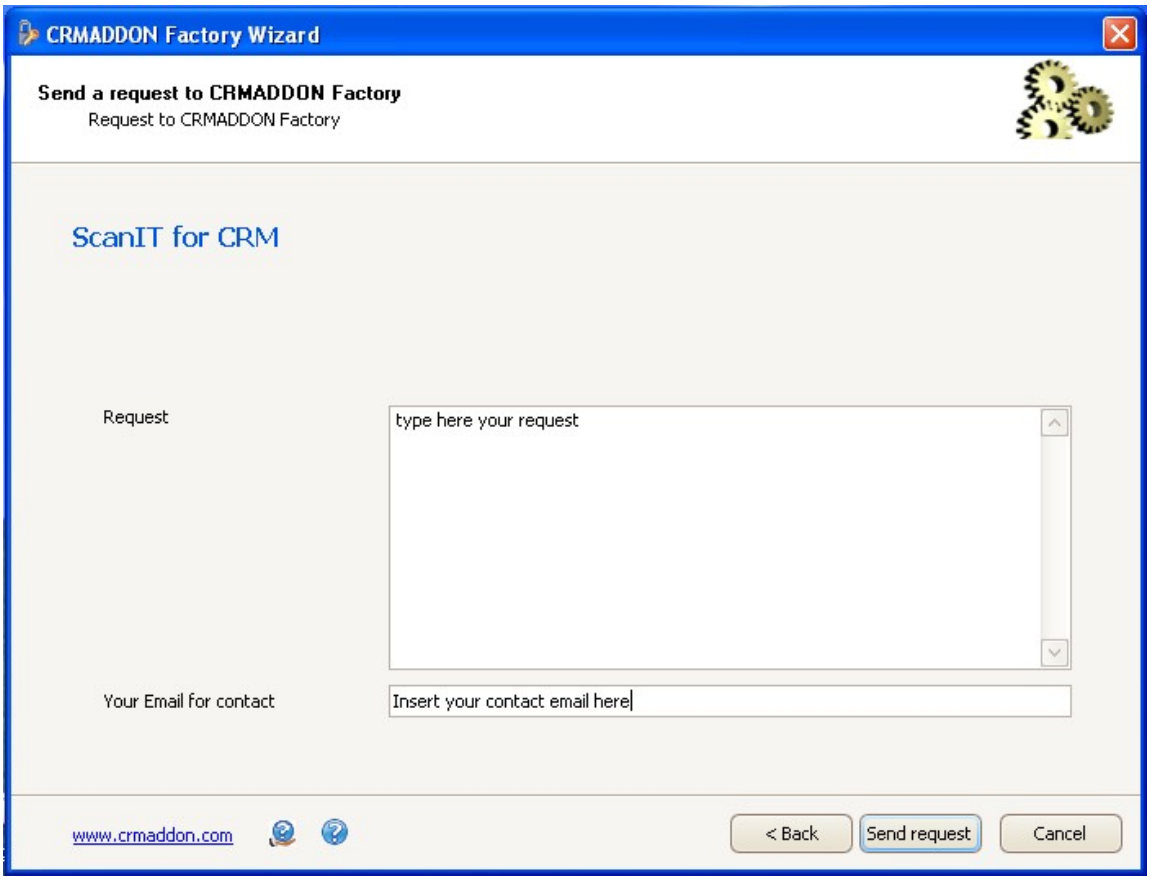
See also

Order license
Order an Upgrade
Order an Update
Send Request

Home > License Wizard > Licensing > Send Request > Send Request

Send Request

You can use this simple form to send us a request. Just type in your question and provide the email you would like us to reply to:



See also

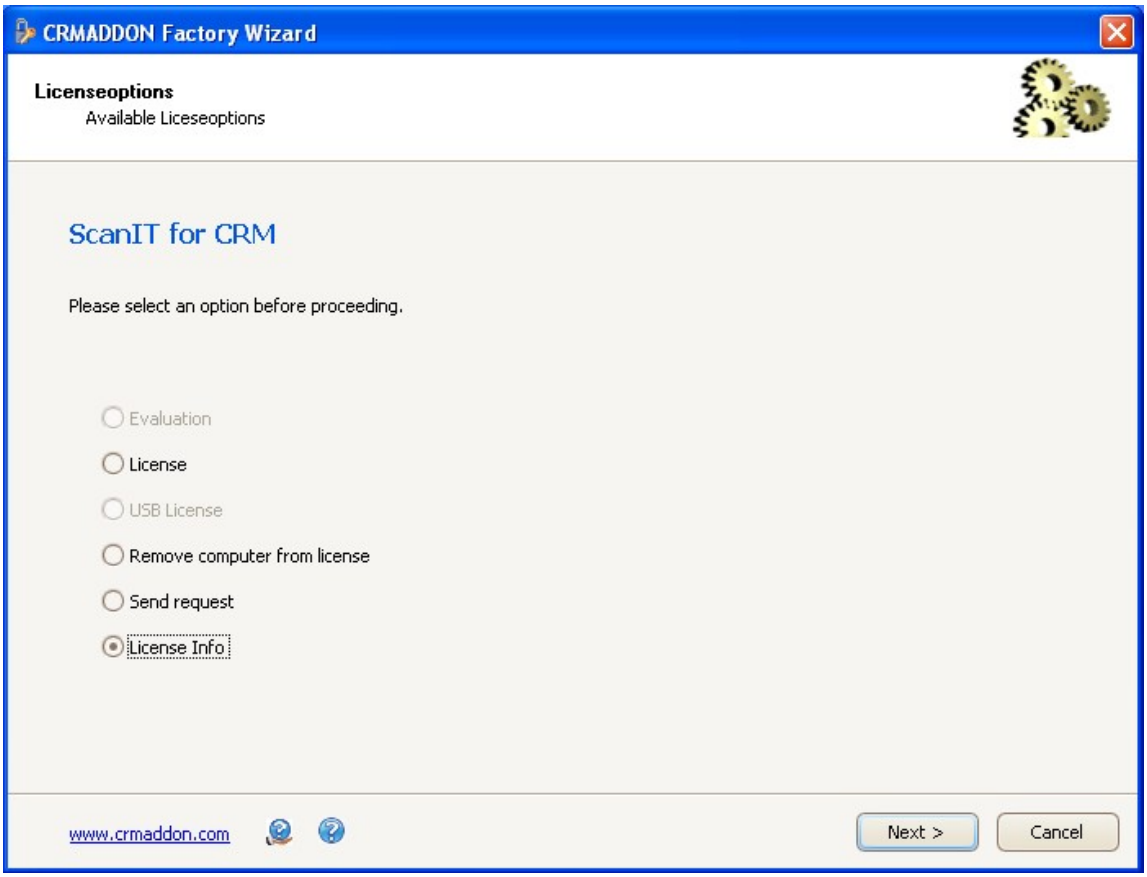
Order license
Order an Upgrade
Order an Update
Send Reset Request

Home > License Wizard > Licensing > License Info

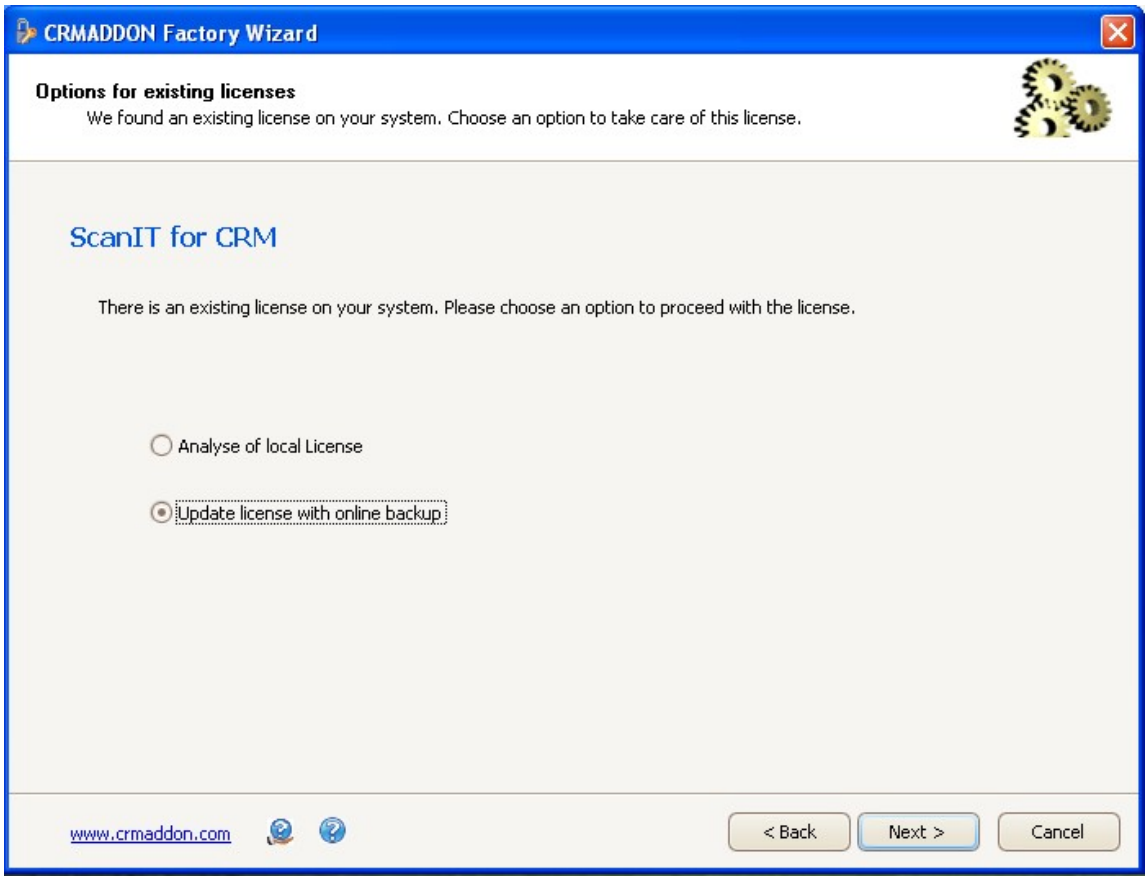
License Info

Here you can check the license code for your computer and for other machines where the license is installed. If the machine is in evaluation mode then 'Evaluation' option will be active, if there is a license specified for this machine, then 'Evaluation' will be inactive as shown on the screenshot below.

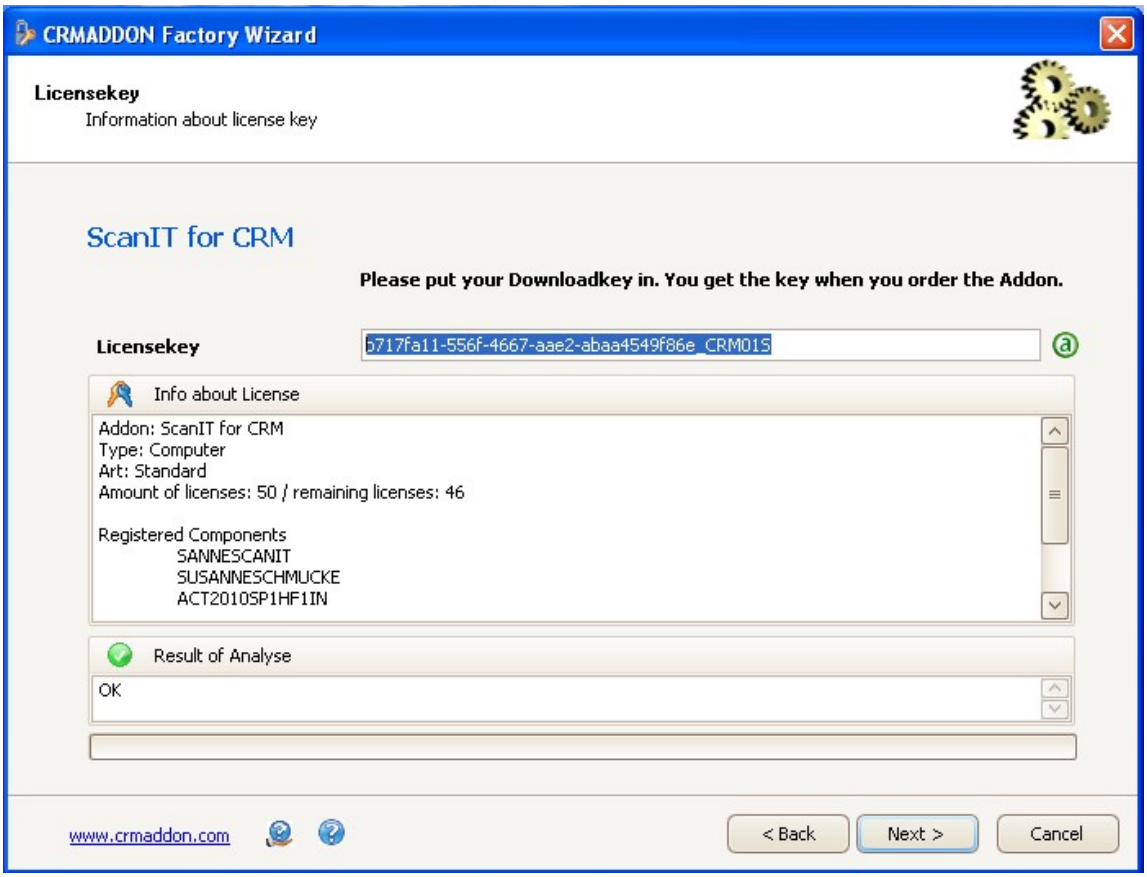
You need to select the following option on the License Wizard to check your license information:



On the next step you can select whether you would like to analyse the local license or update it. You need to select the first option '**Analyse the local license**' to get details about the license:


CRMADDON Factory Wizard
Options for existing licenses
We found an existing license on your system. Choose an option to take care of this license.
ScanIT for CRM
There is an existing license on your system. Please choose an option to proceed with the license.
Analyse of local License
Update license with online backup
www.crmaddon.com
< Back
Next >
Cancel

The following window will open:



On this window you will find information about the license owner, number of used and available licenses, what addon is the license for.

To proceed further you will need to click **'Next'** button and then **'Finish'** to close the License Wizard.

If you experience any issues and need our assistance, please click the following button at the bottom of the Wizard to create a support ticket

To open our User Manual, please click button at the bottom of the Wizard.

See also

Evaluation
License
Remove computer from license
Send Request

Table_IT_US Administration

Any folders or pages added under =Admin= will only be visible in edit mode.

Reports

Page Summary

Activity Log

PDF Template

Table_IT_US

User Manual

Created: Wednesday, September 14, 2011

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Table_IT_US

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[website_url]

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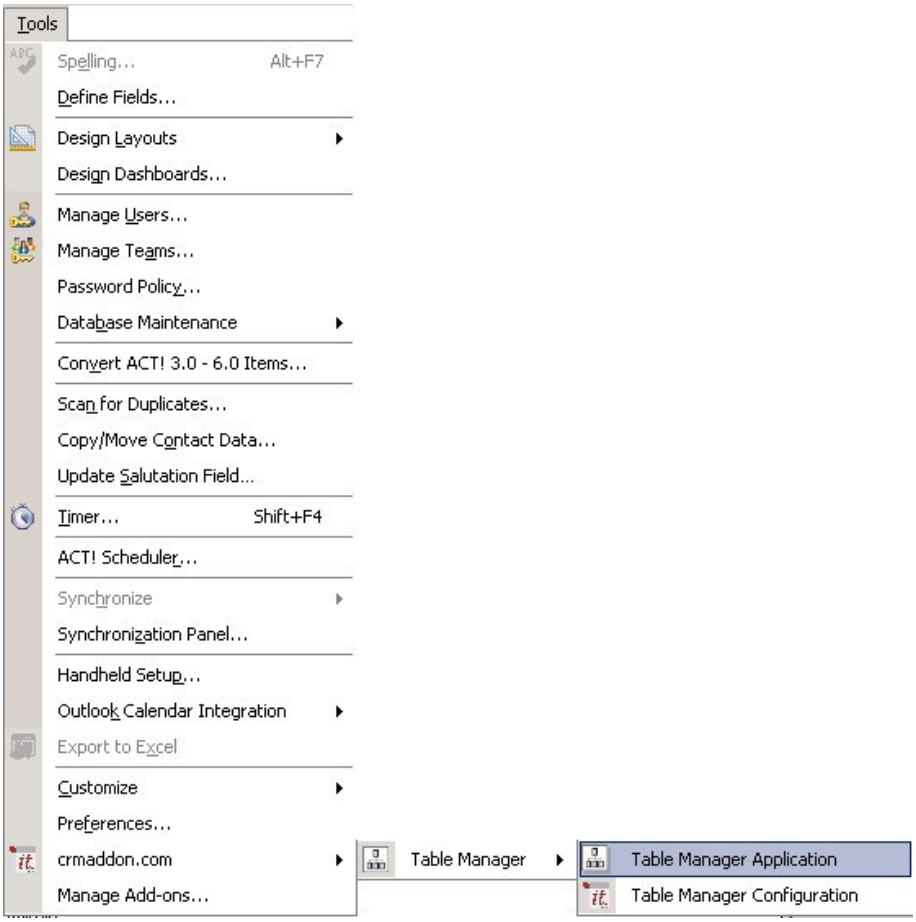
Start the Table IT Application

To create an extra table you first have to start Table IT.
There are two methods to start the Table Manager:

1. Click on the - button in the ACT! tool bar

or :

2. *Tools -> crmaddon.com -> Table Manager*



See also

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Show on Masterrecord
About the report designer
Calculation
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Table View Settings
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View of the table in ACT!
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Worth Knowing

Using Table IT with Remote Database

Table IT can be easily used with remote databases. However, there are some recommendations for this:

- Table IT should be installed on the machine where remote database is used
- The Database ACT! User should have Admin rights
- Synchronization should be performed each time the table is updated

See also

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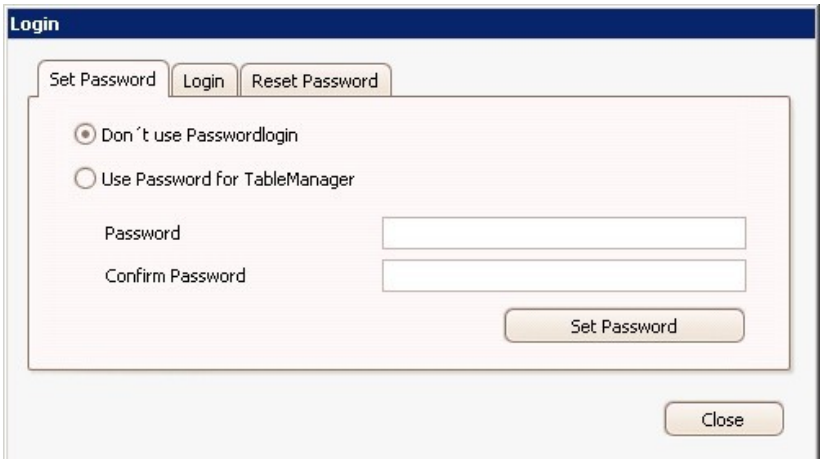
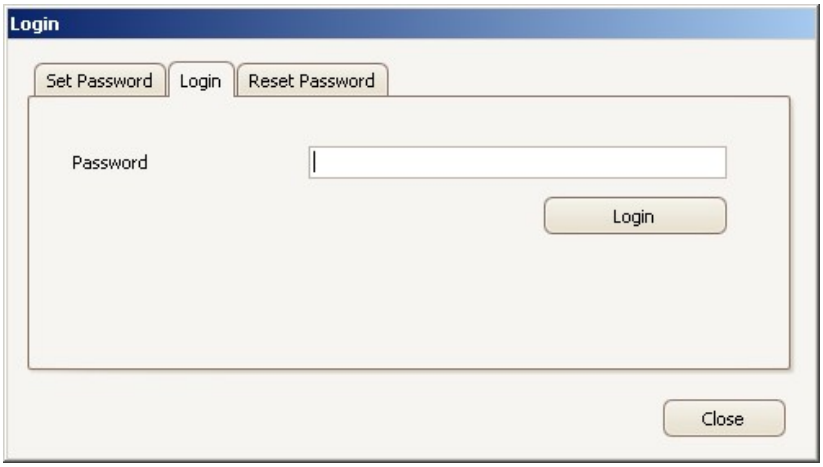
Login

You have a possibility to create a password for Table IT.



That means, only the person who knows this password can see your table.



If you want to change the password you need to specify a new one on the 'Reset Password' screen.

See also

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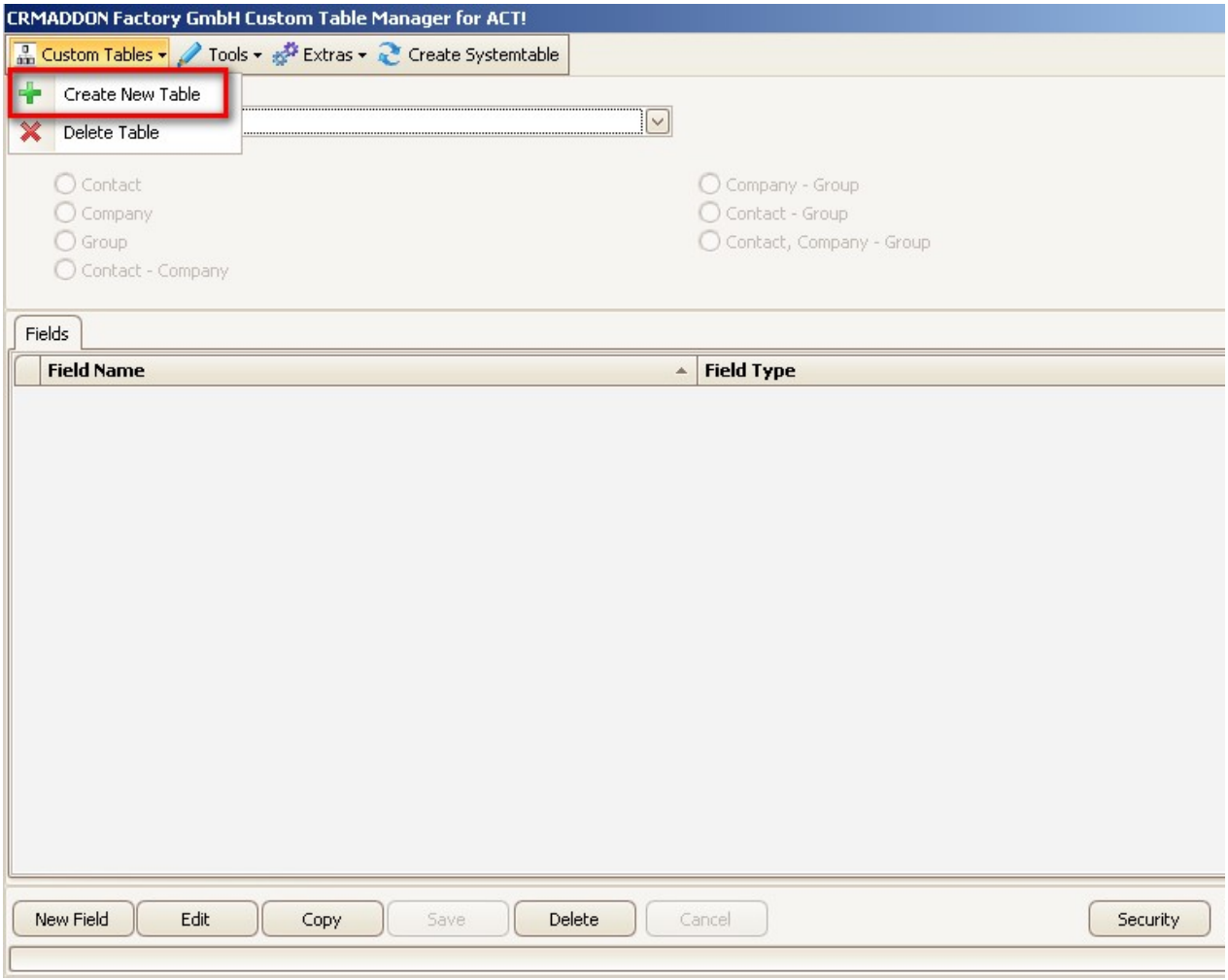
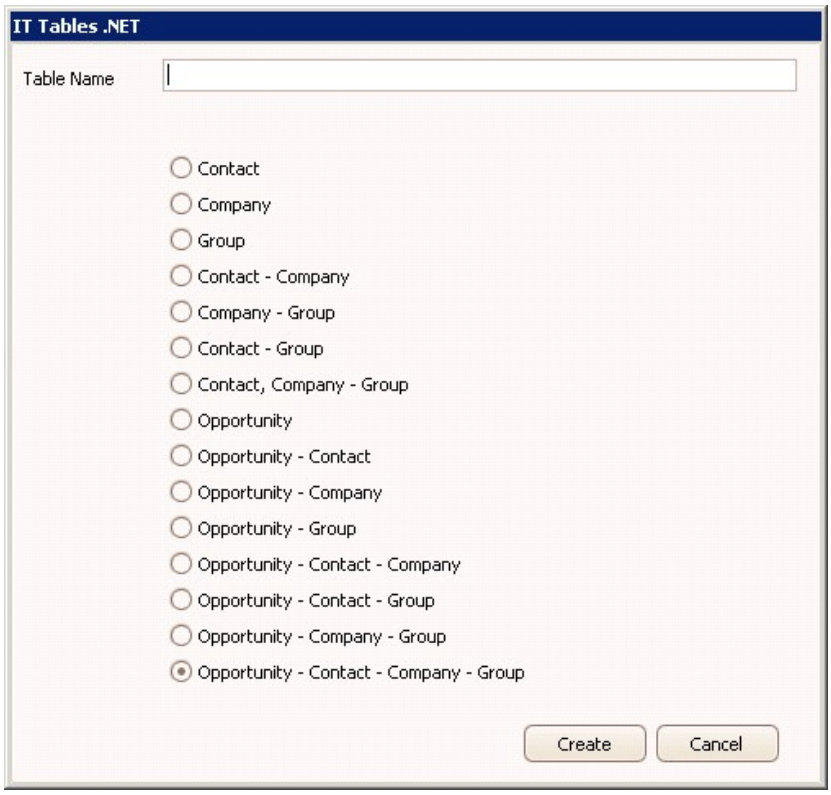
Create a new Table

To create a new table, please select **'Create New Table**' command in **'Custom Tables'** section of the top menu.



Then select a relation option for your table:



When you create a new table you can choose between the following relation options:

Contact
Company
Group
Opportunity
Contact and Company
Contact and Group
Company and Group
Contact, Company and Group
Opportunity and Contact
Opportunity and Company
Opportunity and Group
Opportunity, Contact and Company
Opportunity, Contact and Group
Opportunity, Company and Group
Opportunity, Contact, Company and Group

According to the selected relation option the table will appear under contacts, companies, opportunities or groups. You can also select the table to appear to several ACT! sections.

To complete table creation, please click

button and confirm table creation by clicking **OK** button on the following window:

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Worth Knowing

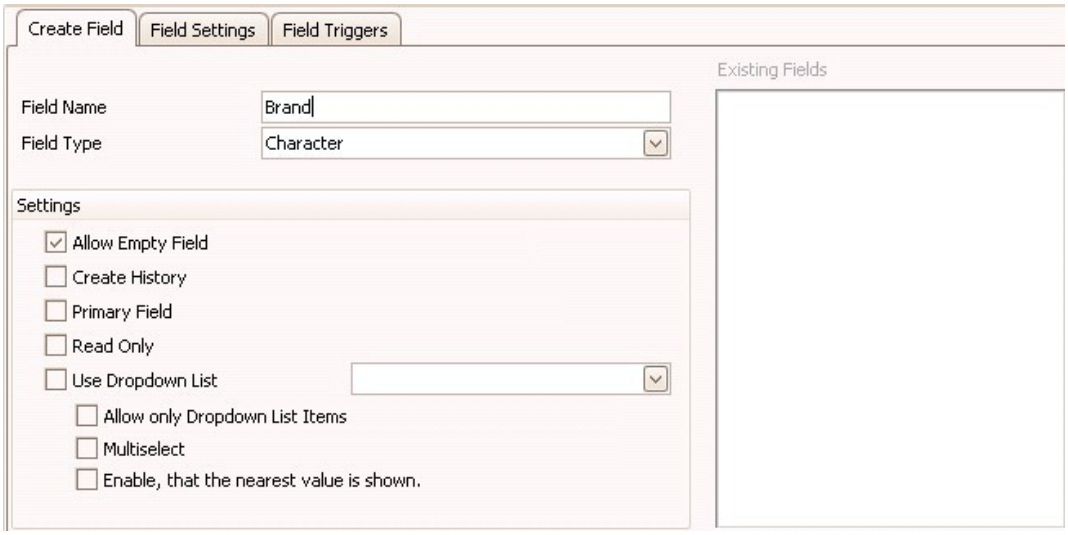
Home > Create a new Table > Tab 'Create Field'

Tab "Create Field"

From the

tab you can add and define the number of fields you would like to have in your Custom Table.

Example:
A garage might add fields for information about the cars such as date sold, brand, model, price, color, # of doors, etc.

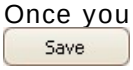


Function	Description
Field name	Enter a name for the field.
Field type	Define what information the field should contain. For example: Date, yes/no, Currency, Characters,...
Create history	Check the box if you want to create a history.
Primary field	A primary field always has an explicit ID to mark the record. For example a contact number.
Read only	Check here if data should be read only.
Use Dropdown list	Define the different selection criteria for a dropdown list. Select from 'Limit to list' or 'Multiselect' or 'Enable type-ahead'.

The following table explains field types meanings that are available in ACT! and Table IT. Please make sure that you selected the correct type value for your field.

Type name	Description
Address	Alphanumeric characters (letters, numbers, or symbols).
Annual Event	Events that recur annually, formatted according to the date settings in the Microsoft Windows Regional Settings control panel. The field contains a drop-down date selector.
Character	Alphanumeric characters (letters or numbers).
Currency	Numbers formatted according to the currency settings in the Windows Regional Settings control panel. Currency settings for some regions can contain commas.
Date	Dates formatted according to the date settings in the Windows Regional Settings control panel. The field contains a drop-down date selector.
Date / Time	Date and time formatted according to the date and time settings in the Windows Regional Settings control panel. The field contains a drop-down date/time selector.
Decimal	Numbers and decimal points. Users enter the decimal point. Note: The decimal point is formatted according to the Windows Regional Settings control panel and can contain commas.
Initial-Caps	Alphanumeric characters, formatted with a capital letter at the beginning of each word.
Lowercase	Alphanumeric characters, formatted in all lowercase letters. The Shift and Caps Lock keys have no effect.
Memo	Alphanumeric characters (letters, numbers, or symbols).
Number	Numbers only. Letters typed in this field are ignored.

Picture	Pictures in .bmp, .gif, .jpg, .png, .ico, .emf, or .wma format.
Time	Time of day formatted according to the time settings in the Windows Regional Settings control panel. The field contains a drop-down time selector.
Uppercase	Alphanumeric characters, formatted in all uppercase letters. The Shift and Caps Lock keys have no effect.
URL	Alphanumeric characters. The address entered in the field becomes an active link to a URL.
Yes/No	Check box. If the check box is selected, it has a "Yes" value. If the check box is cleared, it has a "No" value.

Once you specify fields name, field type and define field settings, you need to click 

button to save this field.

Start creating a new field by clicking **'Yes'** button on the following window:

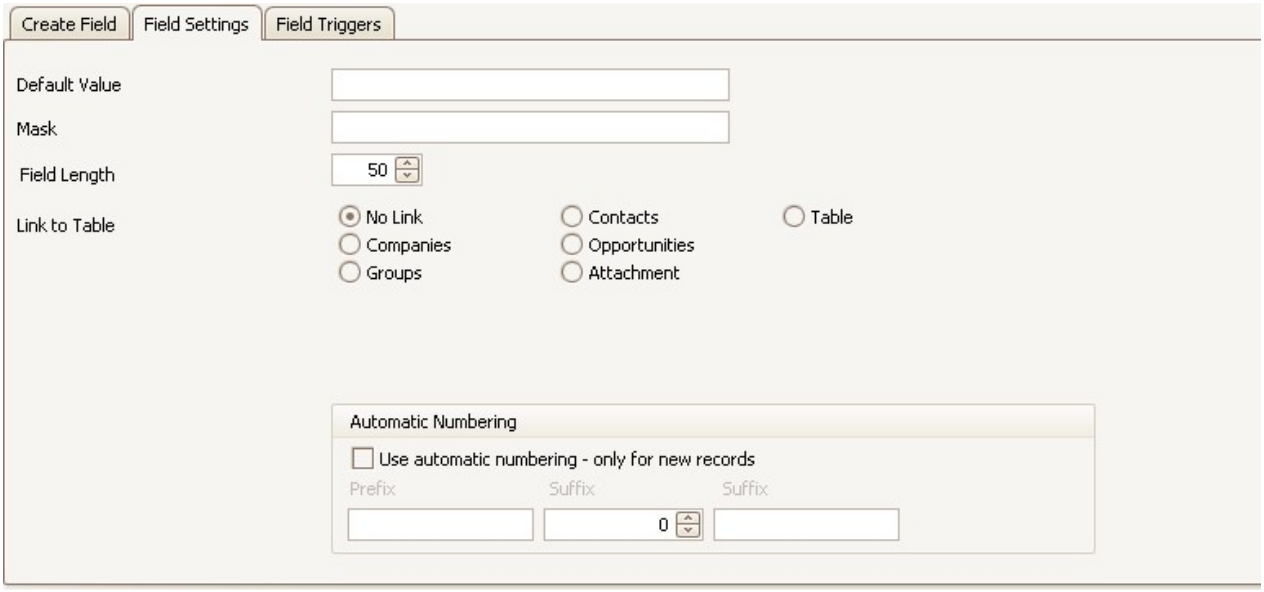
Disable this pop up by checking **'Please do not ask again'** checkbox.

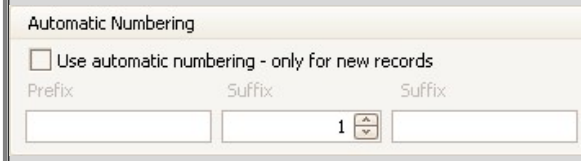
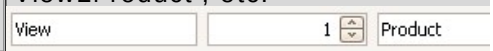
See also

Tab 'Field Settings'
Tab 'Field Trigger'
Function of the Footer

Tab "Field Settings"

On Field Settings tab you can specify additional settings for your table Custom Tables



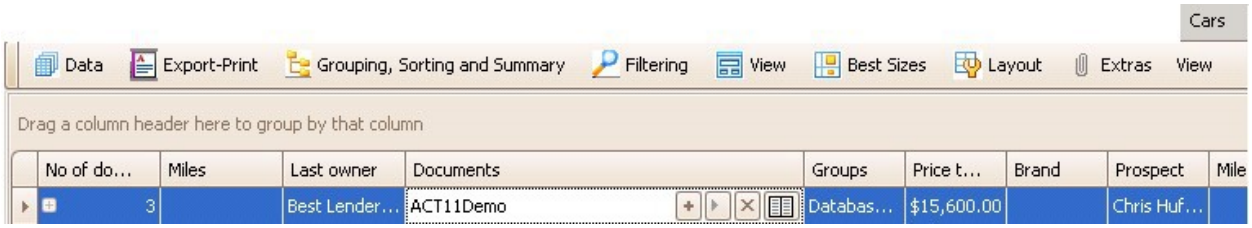
Function	Description
Default Value	Enter a default value for this field o you want it filled in automatically. T can, of course, be overridden when entering data in the actual table...
Mask	*- Future functionality -*
Field Length	Define the number of characters in t field.
Link to Table	Tick the radio button of the field yo want to link in your table.
No Link	No link will be made.
Companies	Link one or more companies to your table.
Groups	Link one or more groups to your tab
Contacts	Link one or more contacts to your ta
Opportunities	Link one or more opportunities to yo table.
Attachment	Link one or more attachments to yo table.
Table	Link another Custom table
	If you check **'Automatic Numberin** option, then all your new records wi numbered automatically. On this tab can set suffix, prefix and start numb for your new records. E.g. You can s Prefix as 'View', Start Number as '1' Suffix as 'Product' and will get 'View1Product', next record will be 'View2Product', etc. 

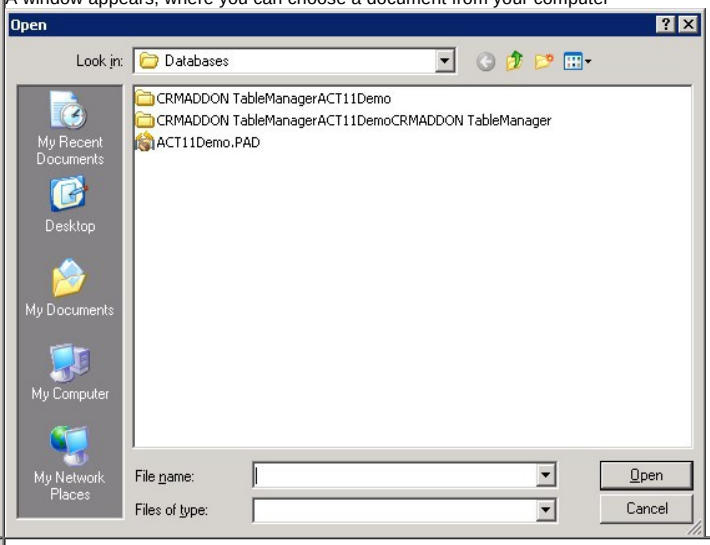
See also

Tab 'Create Field'
Tab 'Field Trigger'
Function of the Footer

Link table with document

If you select ***'Document'*** under ***'link field settings'*** you will be able to attach a document to this column in your table.
If you attach a document to your table, this document will also be saved/stored in the standard folder in ACT!.



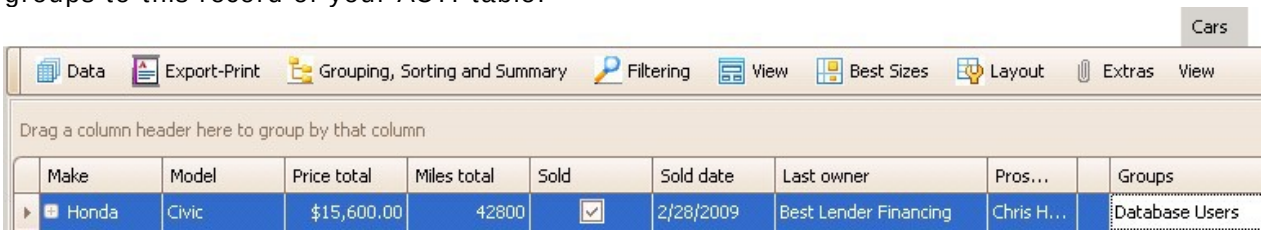
	A window appears, where you can choose a document from your computer 
	An attached document will be removed from your table, but it still remains in the standard folder in ACT!
	The document will be opened.

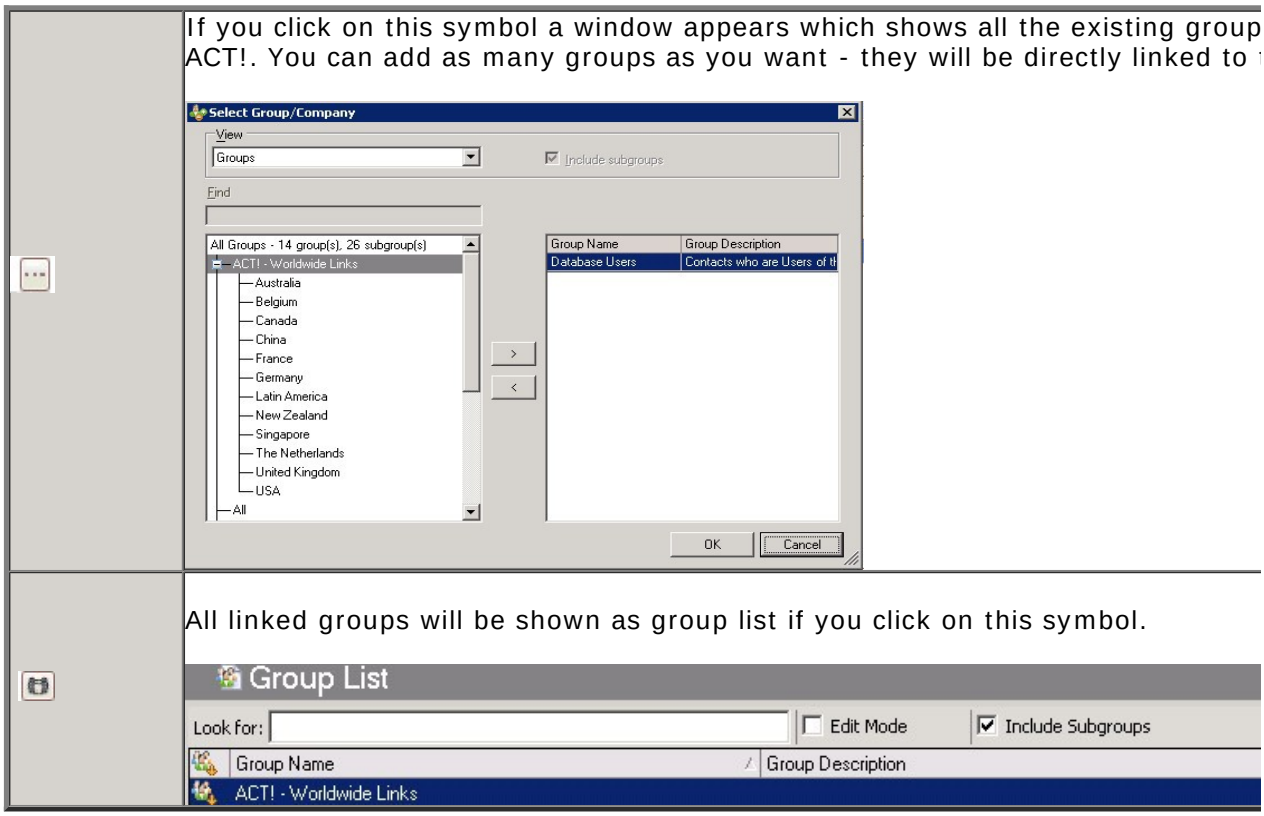
See also

Link table with groups
Link table with contacts
Link table with companies
Link table with opportunities

Link table with groups

If you choose under the field settings *Link table with* ***'Groups'*** you can add one or more groups to this record of your ACT! table.





If you click on this symbol a window appears which shows all the existing group ACT!. You can add as many groups as you want - they will be directly linked to

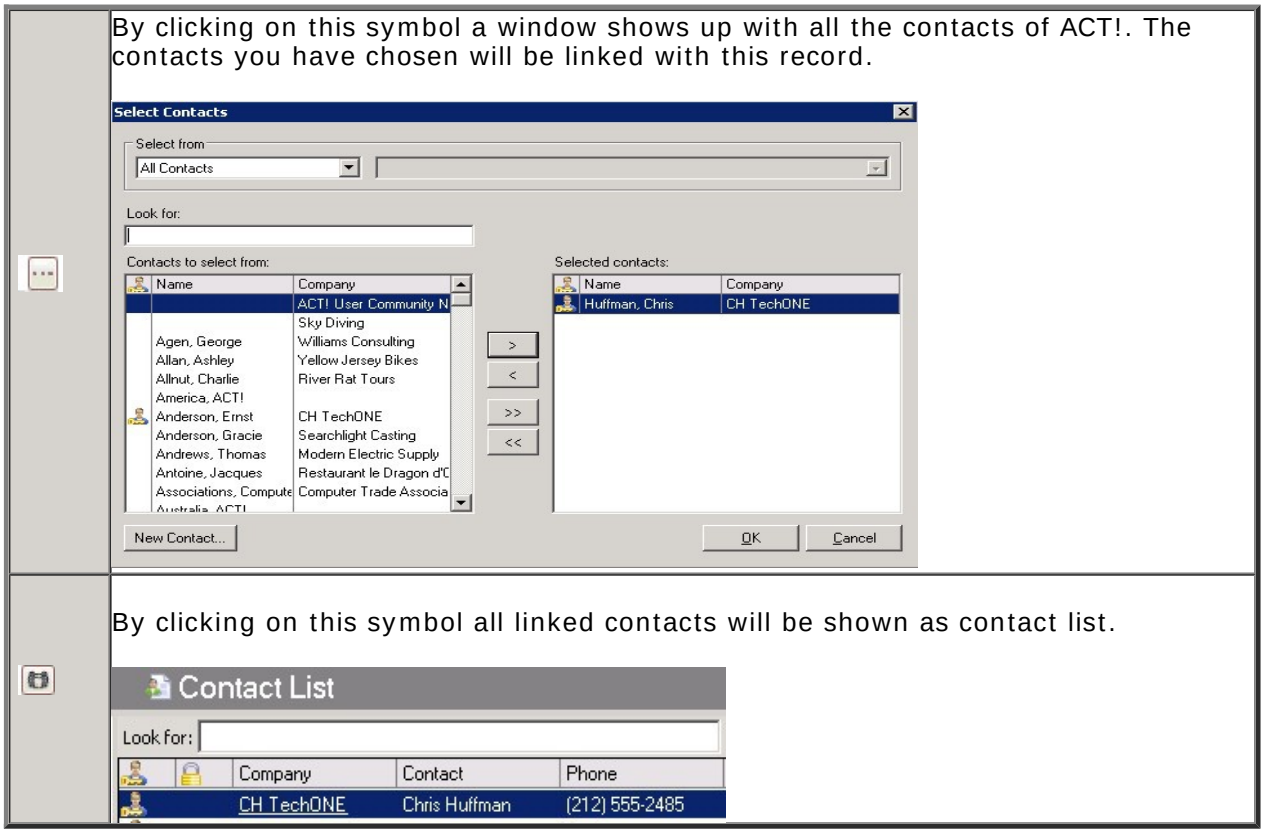
All linked groups will be shown as group list if you click on this symbol.

See also

Link table with document
Link table with contacts
Link table with companies
Link table with opportunities

Link table with contacts

If you choose under the field settings *Link table with* ***'Contacts'*** you can add one ore more contacts to this column in your ACT! table.

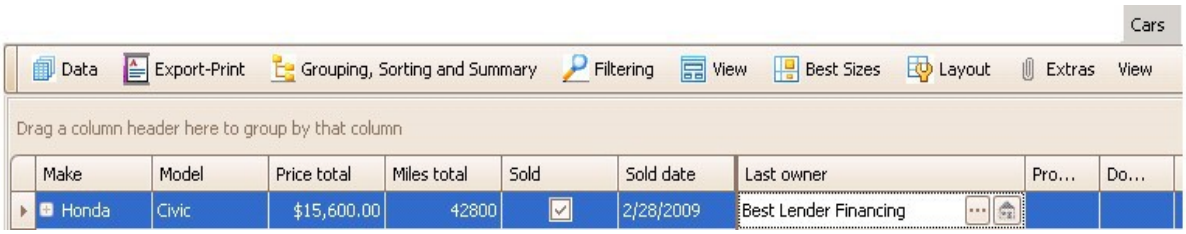


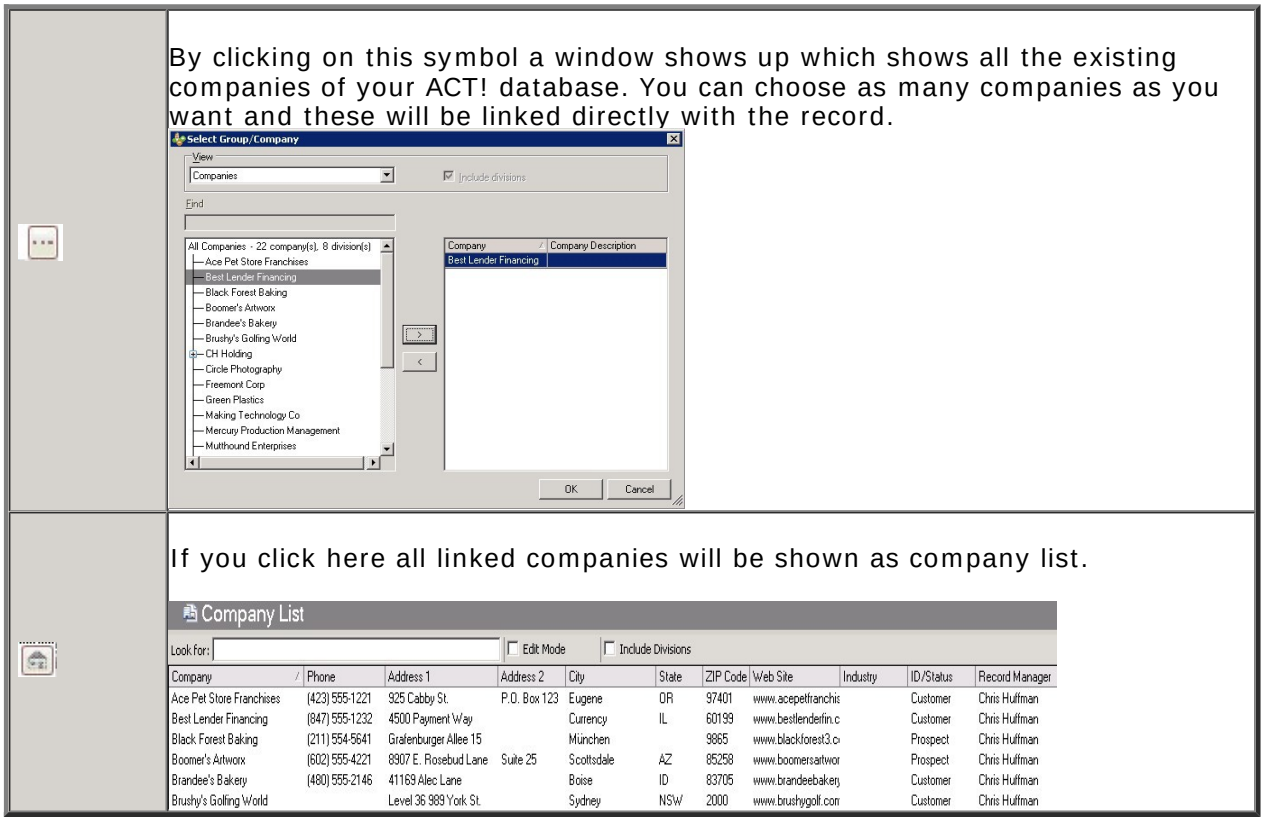
See also

Link table with document
Link table with groups
Link table with companies
Link table with opportunities

Link table with companies

If you choose under the field settings *Link table with* ***'Companies'*** you can add one or more companies to this record of your ACT! table.



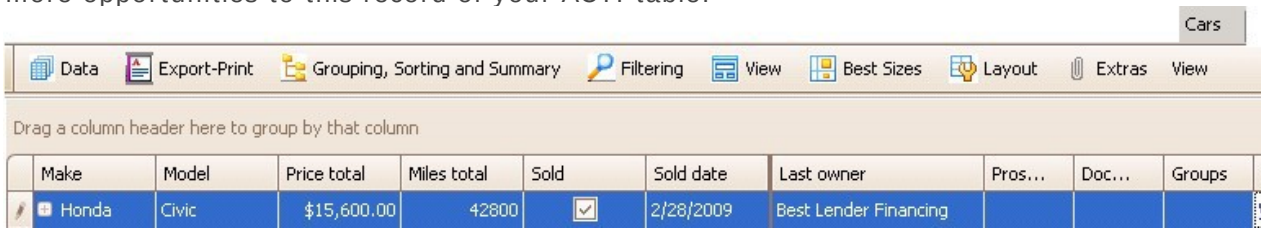

By clicking on this symbol a window shows up which shows all the existing companies of your ACT! database. You can choose as many companies as you want and these will be linked directly with the record.
Select Group/Company
View
Companies
Include divisions
Find
All Companies - 22 company(s), 8 division(s)
Ace Pet Store Franchises
Best Lender Financing
Black Forest Baking
Boomer's Artworx
Brandee's Bakery
Brushy's Golfing World
CH Holding
Circle Photography
Freemont Corp
Green Plastics
Making Technology Co
Mercury Production Management
Muthound Enterprises
Company
Company Description
Best Lender Financing
OK
Cancel
If you click here all linked companies will be shown as company list.
Company List
Look for:
Edit Mode
Include Divisions
Company
Phone
Address 1
Address 2
City
State
ZIP Code
Web Site
Industry
ID/Status
Record Manager
Ace Pet Store Franchises (423) 555-1221 925 Cabby St. P.O. Box 123 Eugene OR 97401 www.acepetfranchis Customer Chris Huffman
Best Lender Financing (847) 555-1232 4500 Payment Way Currency IL 60199 www.bestlenderfin.c Customer Chris Huffman
Black Forest Baking (211) 554-5641 Grafenburger Allee 15 München 9865 www.blackforest3.c Prospect Chris Huffman
Boomer's Artworx (602) 555-4221 8907 E. Rosebud Lane Suite 25 Scottsdale AZ 85258 www.boomersartwor Prospect Chris Huffman
Brandee's Bakery (480) 555-2146 41169 Alec Lane Boise ID 83705 www.brandeebakery Customer Chris Huffman
Brushy's Golfing World Level 36 989 York St. Sydney NSW 2000 www.brushygolf.com Customer Chris Huffman

See also

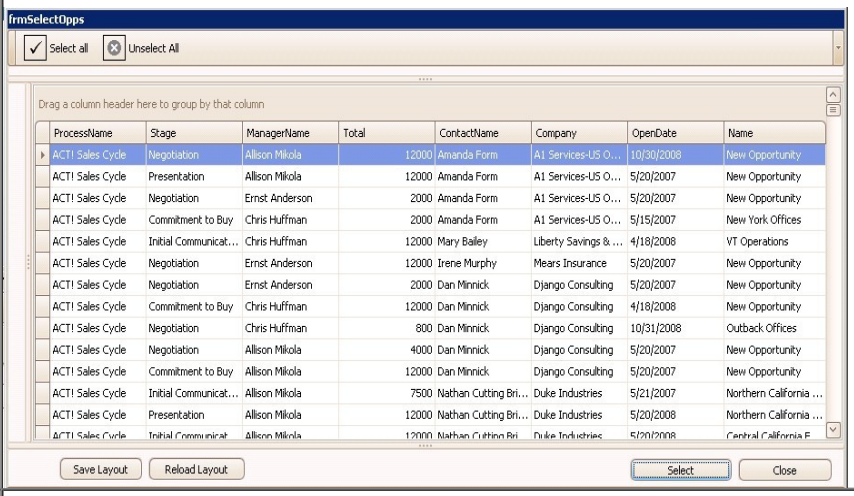
Link table with document
Link table with groups
Link table with contacts
Link table with opportunities

Link table with opportunities

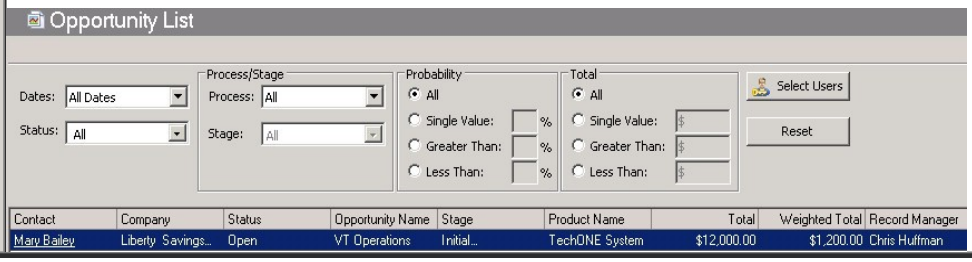
If you choose under the field settings *Link table with* ***'Opportunities'*** you can add one or more opportunities to this record of your ACT! table.



By clicking on this symbol a window shows up will all the opportunities of your ACT! database. You can choose as many opportunities as you want and link them to this record.


frmSelectOpps
Select all
Unselect All
Drag a column header here to group by that column
ProcessName | Stage | ManagerName | Total | ContactName | Company | OpenDate | Name
ACT! Sales Cycle | Negotiation | Allison Mikola | 12000 | Amanda Form | A1 Services-US O... | 10/30/2008 | New Opportunity
ACT! Sales Cycle | Presentation | Allison Mikola | 12000 | Amanda Form | A1 Services-US O... | 5/20/2007 | New Opportunity
ACT! Sales Cycle | Negotiation | Ernst Anderson | 2000 | Amanda Form | A1 Services-US O... | 5/20/2007 | New Opportunity
ACT! Sales Cycle | Commitment to Buy | Chris Huffman | 2000 | Amanda Form | A1 Services-US O... | 5/15/2007 | New York Offices
ACT! Sales Cycle | Initial Communicat... | Chris Huffman | 12000 | Mary Bailey | Liberty Savings & ... | 4/18/2008 | VT Operations
ACT! Sales Cycle | Negotiation | Ernst Anderson | 12000 | Irene Murphy | Mears Insurance | 5/20/2007 | New Opportunity
ACT! Sales Cycle | Negotiation | Ernst Anderson | 2000 | Dan Minnick | Django Consulting | 5/20/2007 | New Opportunity
ACT! Sales Cycle | Commitment to Buy | Chris Huffman | 12000 | Dan Minnick | Django Consulting | 4/18/2008 | New Opportunity
ACT! Sales Cycle | Negotiation | Chris Huffman | 800 | Dan Minnick | Django Consulting | 10/31/2008 | Outback Offices
ACT! Sales Cycle | Negotiation | Allison Mikola | 4000 | Dan Minnick | Django Consulting | 5/20/2007 | New Opportunity
ACT! Sales Cycle | Commitment to Buy | Allison Mikola | 12000 | Dan Minnick | Django Consulting | 5/20/2007 | New Opportunity
ACT! Sales Cycle | Initial Communicat... | Allison Mikola | 7500 | Nathan Cutting Bri... | Duke Industries | 5/21/2007 | Northern California ...
ACT! Sales Cycle | Presentation | Allison Mikola | 12000 | Nathan Cutting Bri... | Duke Industries | 5/20/2008 | Northern California ...
Save Layout
Reload Layout
Select
Close

All linked opportunities will be shown in the list of the opportunities.



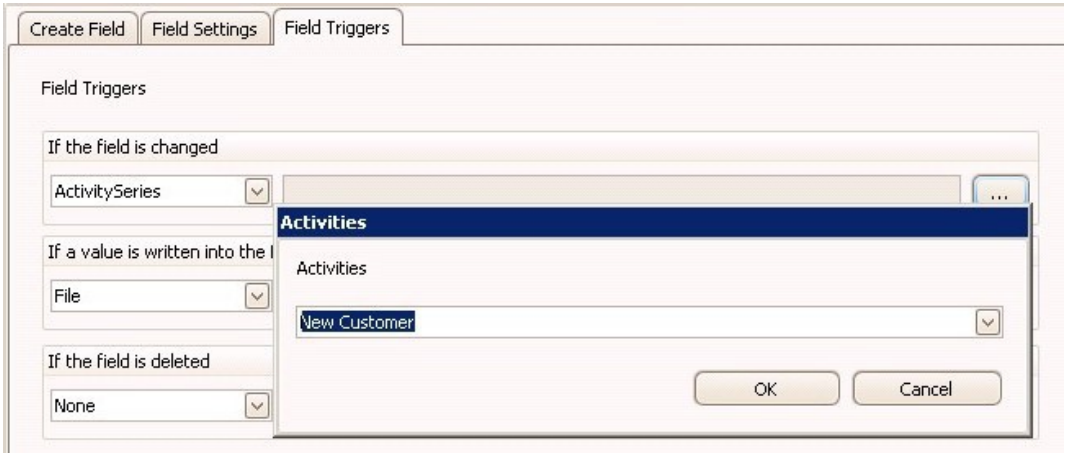
See also

Link table with document
Link table with groups
Link table with contacts
Link table with companies

Home > Create a new Table > Tab 'Field Trigger'

Tab "Field Trigger"

ACT! 11.1 is required for this functionality.



If the field is changed, written or deleted you can choose out of the following possibilities:

Function	Description
Activity Series	Set an activity
File	Open a file
None	Nothing happens

If you completed to fill in all the fields click ***Save*** *button*.

If you do not want to create another field click ***Close*** *button.*

See also

Tab 'Create Field'
Tab 'Field Settings'
Function of the Footer

Function of the Footer

Function	Description
New Field	Create a new field.
Edit	Edit already existing field. However, field type cannot be changed if you use this option
Copy	Copy already existing field.

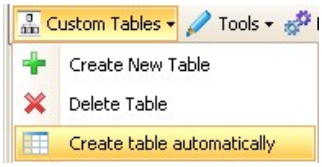
Save	Save the field and the table.
Delete	Delete a marked field.
Undo	All existing fields will be deleted.
Security 	Define the rights of the users/teams and overwrite the standard rights. You can also define whether the table shall be read-only or no access will be granted.
Close	Close the program after adding all needed fields. Your table will now show up in your ACT! database.

See also

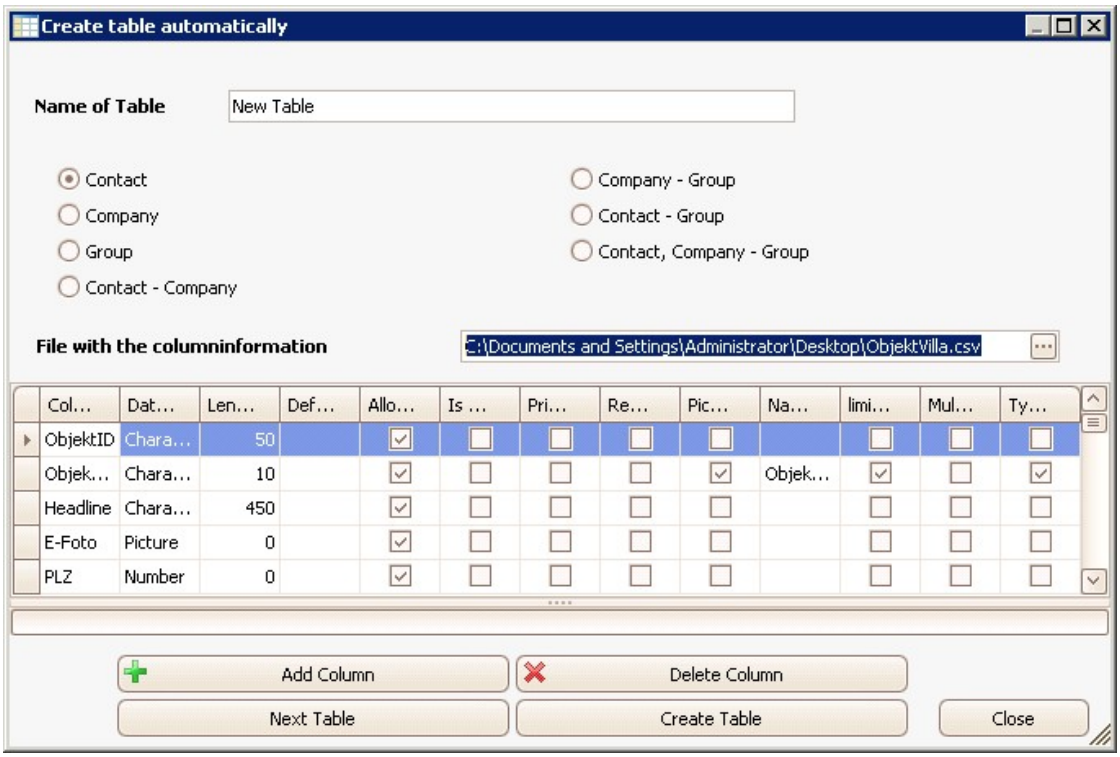
Tab 'Create Field'
Tab 'Field Settings'
Tab 'Field Trigger'

How to create a table automatically.

If you have a source file in CSV format with fields for a table you would like to create in your ACT! database with Table IT tool, you can use **'Create Table Automatically'** feature:



On the following screen you will need to specify a name for your new table, ACT! section you would like to display the database at and a path to the source file which you would like to use for uploading table columns:



You can edit field type here, add new columns or remove the columns you do not need. To create a table, just click "Create Table" button and it will be created.

See also

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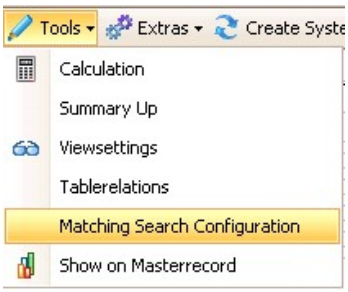
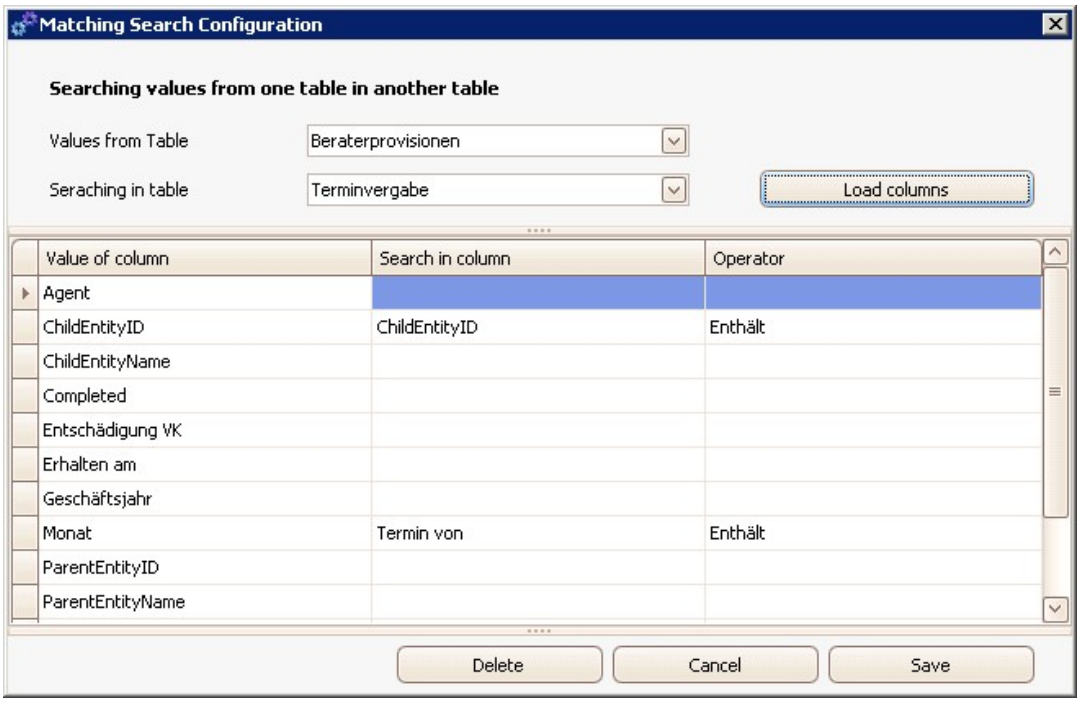
Matching Search Configuration

Matching Search Configuration allows you to search for values from one table in another table. For example you have a real estate business and have a table with houses for sale and a table with description of houses your customers would like to purchase. By using this feature you will be able to perform a search for specific values from one table in another table. To start this option you need to follow Tools / Matching Search Configuration:

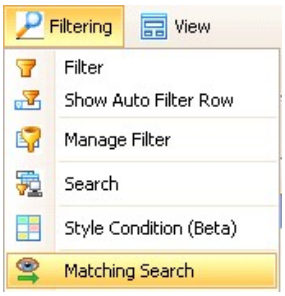


Then you will be able to specify the tables for matching values search:

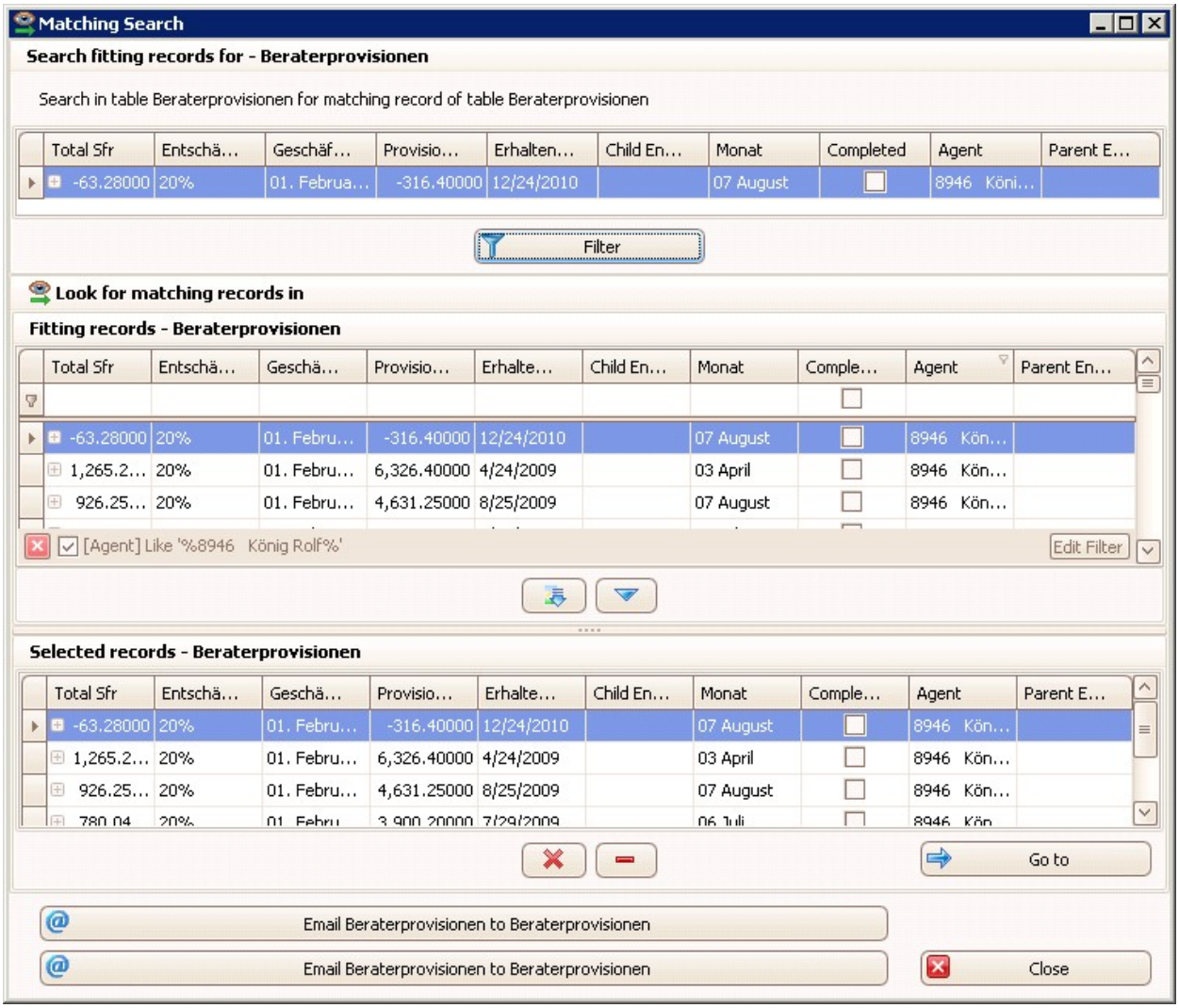


- **Values from Table** - Select a table where you would like to take values from
- **Searching in Table** - A table where the search will be performed in should be selected here

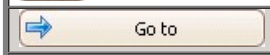
Once after you map the fields for search you will need to save the search schema and you will be able to use it anytime by opening Filtering / Matching Search menu item in your Table View in ACT! database:



The following dialog containing columns and values for matching search will appear:



Function	Description
Search fitting records for - <Table Name>	A table where values are taken from is displayed here
Filter	Use this option to create custom filters
Look for matching records in	A table where the search is performed in is displayed

Fitting Records - <Table Name>	here
	Select a single record
	Select all records
	Deselect a single record
	Deselect all records
	Open view of matching records in ACT!

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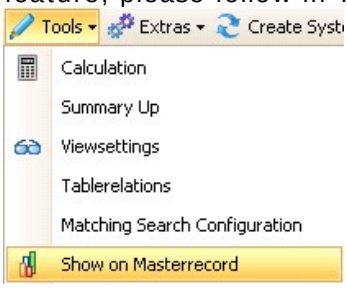
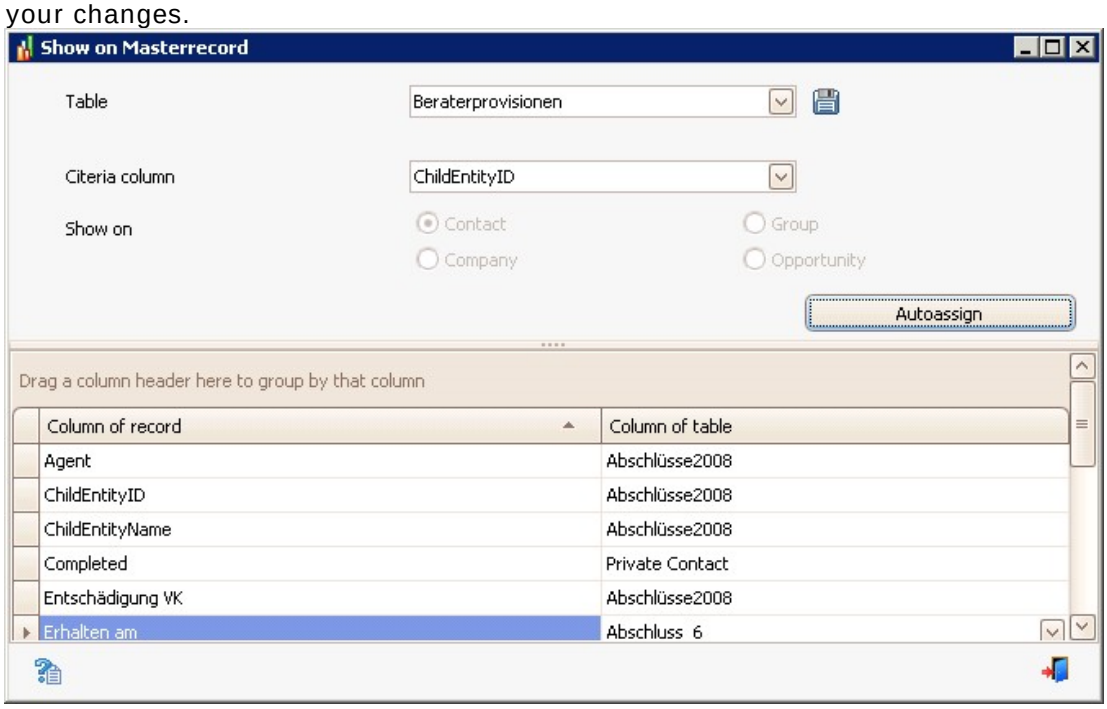
Show on Master record

Show on Master Record feature allows you to select the field from your custom table that will be displayed for your Contact, Company, Group or Opportunity. To start using this feature, please follow in Tools / Show on Masterrecord menu item:



Then select a table and needed column in "Criteria column" list. Click "Save" button to save your changes.



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Home > About the report designer

CRMADDON's **Online Help**

Report Designer is a similar to ACT! report designer tool. It allows you to generate reports and create your own report templates. It is built in Table IT, Dial IT, Service IT and Scan IT addons. With Report Wizard you can create templates and send them by email to your contacts.

Report Wizard gives you an opportunity to create a report template, select which variables will be added to it. Report Designer will help you to add content to this template about your service making the report more user friendly.

Later those reports can be sent by email to your contacts and leads improving your sales and saving your time for creating follow ups for each particular case.

- Welcome
- Configuration
- Create a new Table
- Table View Settings
- Table Relations
- Calculation
- Tab 'Field Settings'
- Start the Table IT Application
- Tab 'Create Field'
- View of the table in ACT!

Home > About the report designer > Report Wizard

Report Wizard

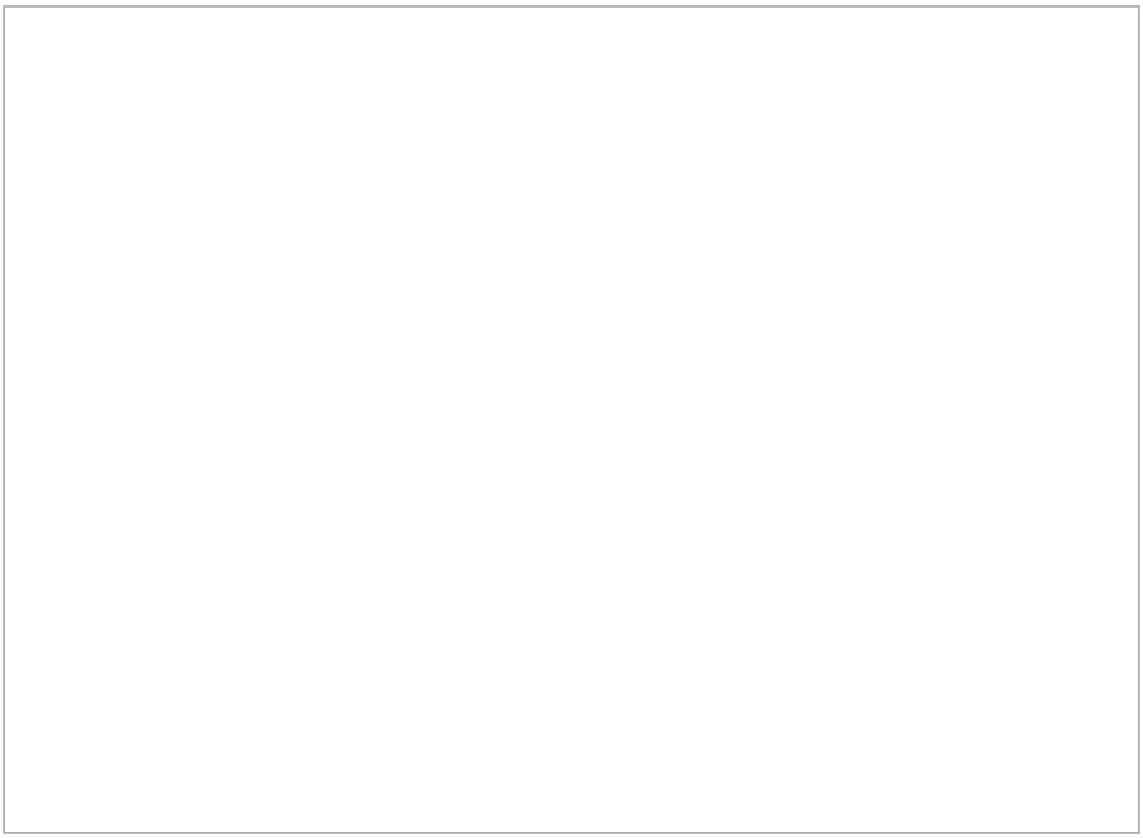
Standard Report

With Report Wizard you can create a report template, please click button to open your report wizard. This wizard will help you to select the information you would like to display in your report and set needed layout.

	Select whether you want to create a Standard Report or a Label Report. Then click on .
	Define the columns which shall be shown in your report. By clicking on the defined columns will be selected for your report, if you click on all columns will be selected for the report. Afterwards click on to get to

	the next step.
	If you want to group by specific columns you can define these columns here. Afterwards please click on .
	Define the layout of your report and click on .
	Define a style for the font and click on .
	Give your report a name and click on to end the wizard.

Then Report Designer will open:



See also:

Report Designer

Report Designer

Report designer allows you to make needed design for your report template, add images, text, links, etc. After making a report template with Report Wizard you will need to use Report Designer to make it more user friendly. Simple template made with Report Wizard will contain only fields' details that were selected for the report. The Report Designer will help you to add there other content describing your services or the purpose of this report.

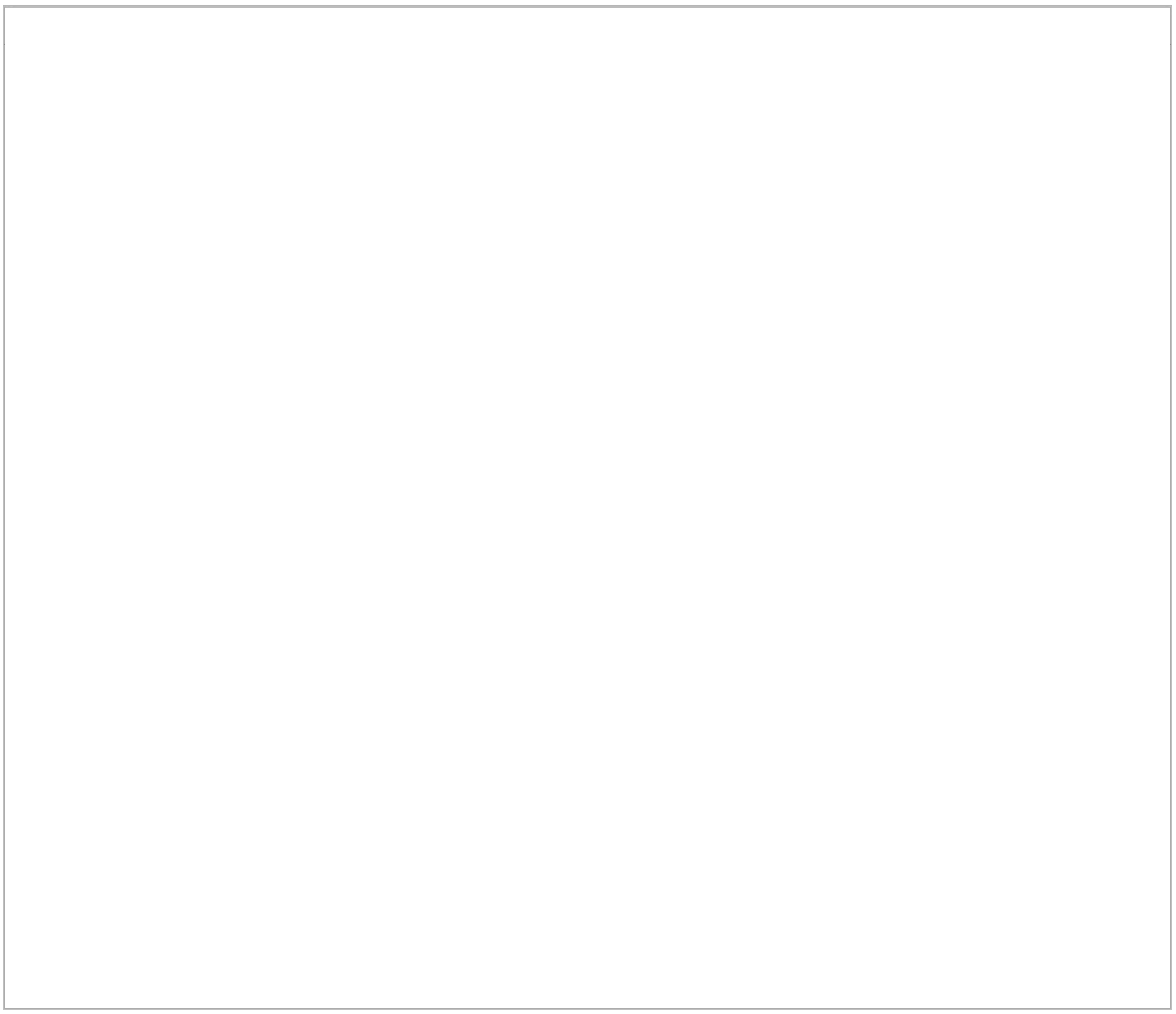
The following example shows how to create a report template with Report Designer tool.

1. Using Report Wizard choose **Standard Report.**
2.**Columns to display** in our report will be: Contact, Department, Title and Company.
3. Let's make Contact column to be as a **group level**.
4.In the next window we will choose Outline 1 as a **layout** and Landscape as **orientation**.
5.**Style** for our report will be Bold.
6.**The title** for our report will be "Dial IT professional".
If you change your mind about names of fields, slyles e.t.c., you can change them in Report

Designer easily.As a result you will see this **window of report designer**. Callouts point to important areas.

You can **preview you report** by clicking HTML View or Preview icons.

Let's come back to our report designer by clicking on the **Designer button**.We will add our **template body** to the field right after the area with Company, Department and Title data. In our template the name of this fied is **"DetailBand1".**



Every template consists of different blocks with text, images, diagrams. All blocks in Report Designer may be easily **moved within template** from one place to another. With the help of your mouse you can change the **size of the blocks**. You can write text to the block and change font name, font size, font style, font color and alignment with the help of these icons in the top menu:
As a sample let's click on two Contact fields in DroupHeaderBand1 at the top of our template and move it down to DetailBand1. In the first field let's change the text from "Contact" to "Dear". Let's also make second field wider and change font style.

==>

If you click on any block in Report Designer to activate it, you will see this **small icon** **at the top right corner**. By clicking on this icon you will **open menu of the block**. The content of the menu depends on icon type. The main functions are:

1.Establish linkage between block and ACT! data. For example when you send one template to different ACT! contacts, Report Designer will put correct name of current contact, his contact details or history data.
2.You can **download data to the block** (e.g. picture or text in .rtf or .txt format).

As a sample let's change contact name "Chris Huffman" to Salutation, so the text will be "Dear Chris". For this you should press icon and choose Salutation in Data Binding field.

You can **create blocks** by selecting icons on Standard Controls panel (on the left) and moving them to the template body.
As a sample let's **create a text** for Dial IT Professional presentation. You can do it with the help of Lable icon or Rich Text icon.
You can write the text or paste it. You can take text from ACT! database or download a file.
Lable icon allows you to apply text formatting for the text. However you cannot edit the part of the text block because font style will be the same withing one block.
Rich Text icon allows you to put it's own font name, font size, font style, font color and alignment for every sentense or for every word. Here you can also download text in rtf or txt formats.
In our sample we need Rich Text icon. So we move it to the template with mouse and paste the text. For the first sentence we will choose different text style.

Then we may move our text block to the right side of the template and **download picture** to the left side.

IMPORTANT: To be sure that the images are visible on the customer's side please download all images to FTP server and use **Image URL** Links, e.g.: www.addons-for-act.de/Images/boxes/dialit.png

Usually you need to write the names of the pictures in small letters and without spaces:

Below the picture let's put **URL link** to Dial IT manual.

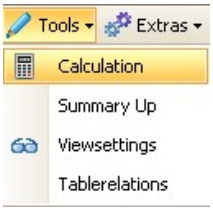
Finally our report is ready.

See also:

Report Wizard

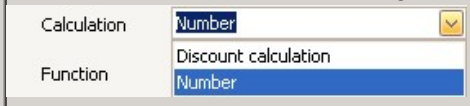
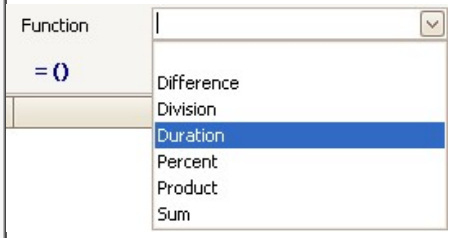
Calculation

You can open 'Calculation' function from the too menu:**Tools / Calculation**:



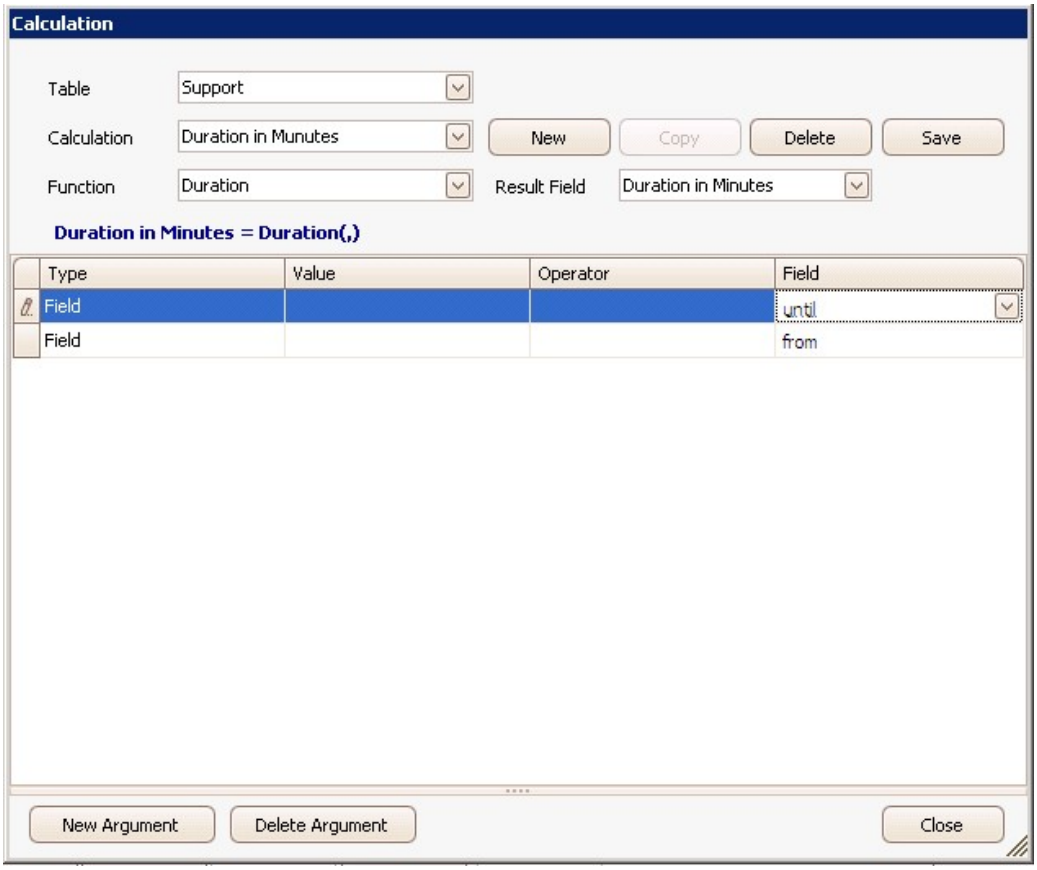
Calculation of Duration and Costs within custom tables

(1) Define a custom table with fields for the required information (see screenshot).

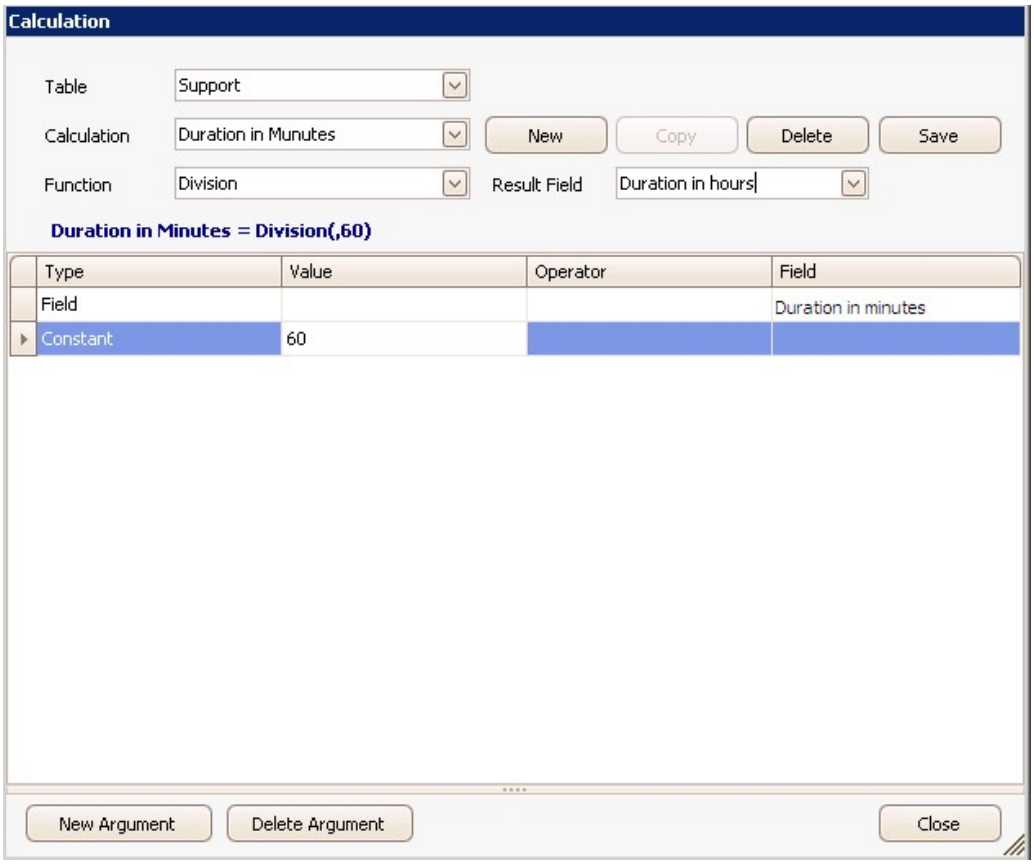
Function	Description
Table	Select here a table which you would like to create calculation for
Calculation	Select here available calculation for editing from the drop down list: 
Function	Select here a function type for your calculation: 
Result Field	Select from the drop down list a result field, where the calculation result will be recorded

If you do not have any calculation you can create a new one by clicking button:

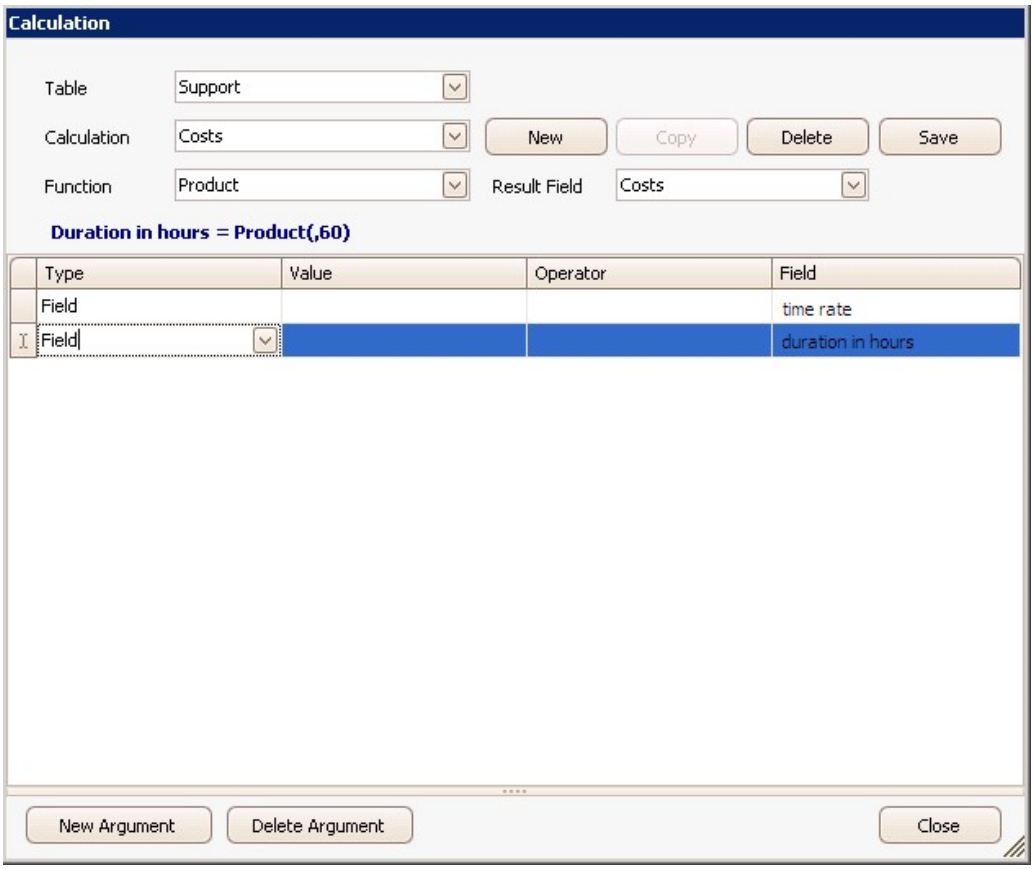
(2) Define Calculation for Duration in Minutes



(3) Define Calculation for Duration in your Price Calculation Unit (for example in hours)



(4) Define Calculation for Costs



(5) Sample Data

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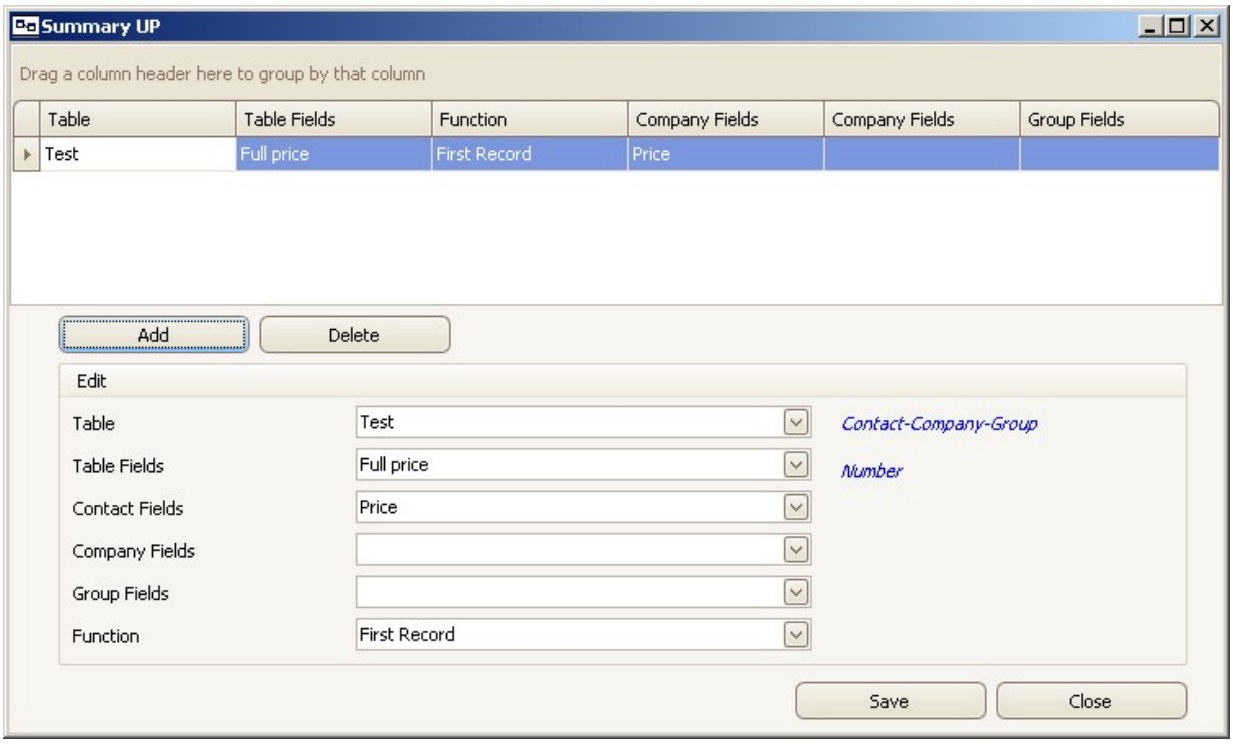
Summary Up

You can use this function to display fields from your Custom Table in Contact, Company or Group View (depending on your table assignment option):

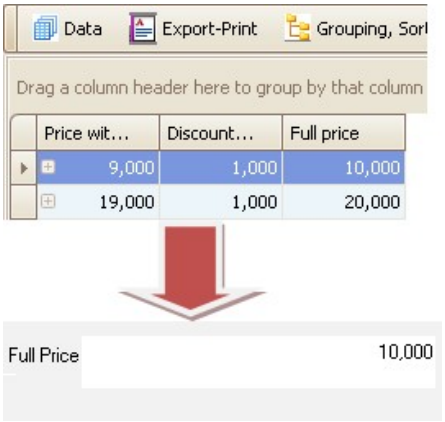


Depending on the field data type you have different functions to "summary up". For example numeric fields allow calculations like Sum, Average, Max, Min. For all data types you can use First/Last Record.

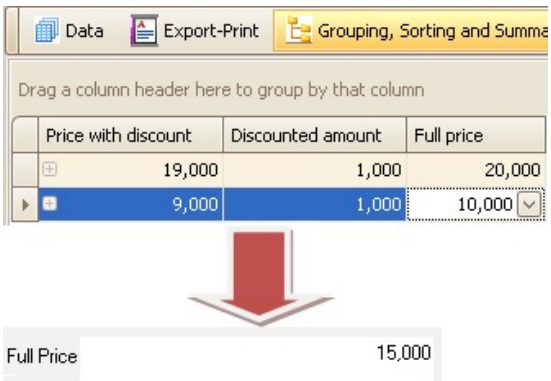
Function	Description
Table	Select a table from the list. The information from this table will be processed with Summary Up feature
Table Fields	Select a field which should be processed
Contact Fields	Select a field from the Contact View where the data should be displayed (is available if the Custom Table is assigned to Contact)
Company Fields	Select a field from the Company View where the data should be displayed (is available if the Custom Table is assigned to Companies)
Group Fields	Select a field from the Group View where the data should be displayed (is available if the Custom Table is assigned to Groups)
	Select a function which should be applied to the table fields:

Function	Average First Record Last Record Maximum Minimum Sum
Add	Click this button to add summary up functionality
Delete	Remove selected summary up functionality from the list
Save	Save Summary up details
Close	Close Summary up window

On the example screenshot the first record of the Custom Table 'Full Price should be added to the Contact View. This will have the following look:



On this example an average amount of the 'Full Price' field is calculated:



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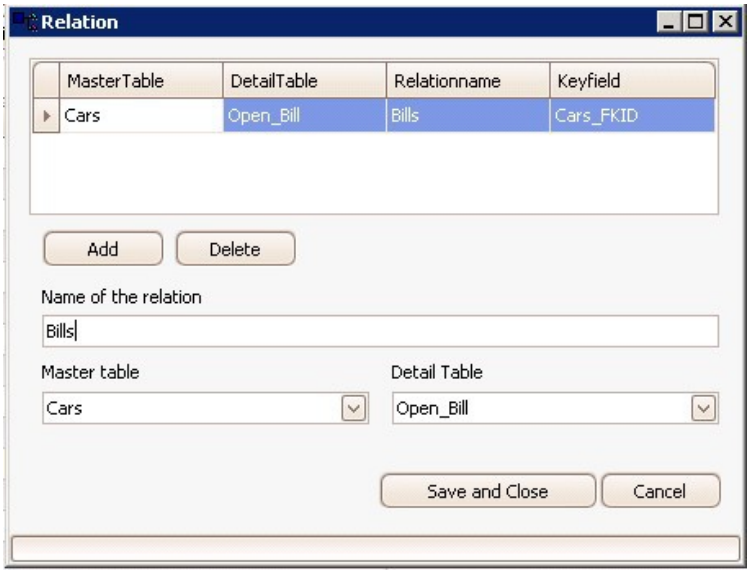
Relation

With Table IT you can add one or more subtable(s) to a master table. Therfore you need at least 2 tables.

(1) Click in the main mask of Table IT on ***Relation***



(2) Name your relation

(3) Choose your ***master table*** from the dropdown list

(4) Choose the ***subtable*** from the 'DetailTable' dropdownlist

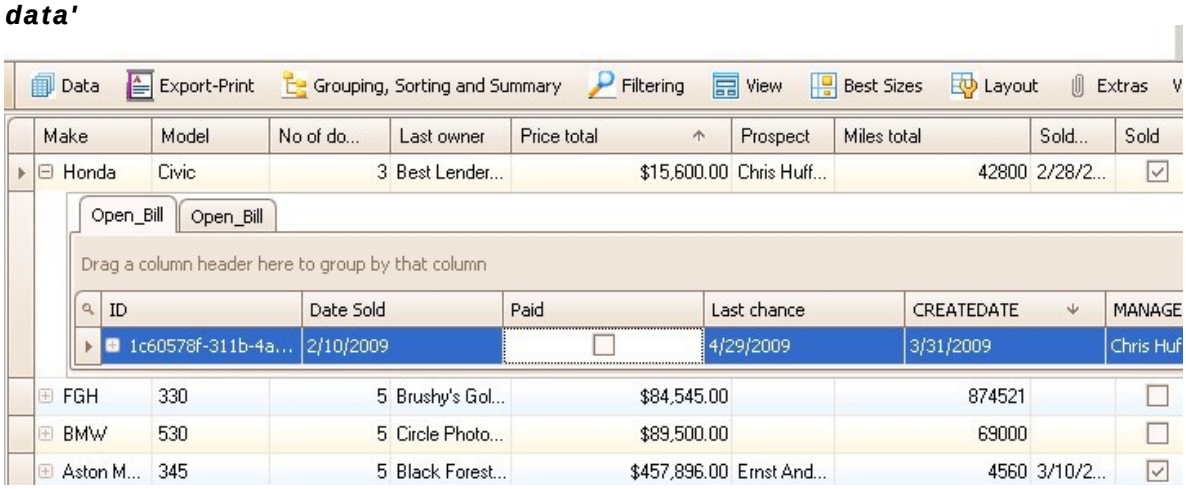
(5) Click ***Add*** to adopt the settings

(6) Click ***Save & Close***

(7) If you open the master table in your ACT! database and you click '+' in front of a record, the subtable will show up under this record

(8) To add data to the subtable click the menu item 'Data' and then **'*add detail***

data'



See also

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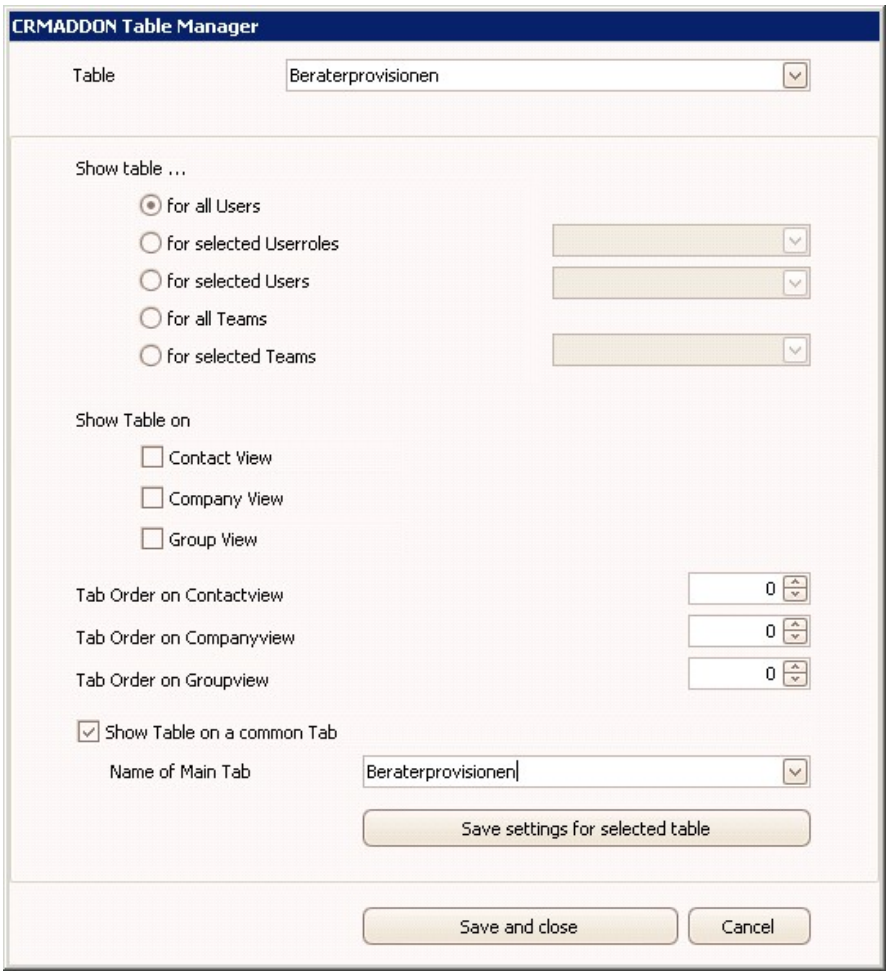
Create a table automatically
Matching Search Configuration
Show on Masterrecord
About the report designer
Calculation
Summary Up
Table View Settings
Configuration
View of the table in ACT!
The toolbar
Worth Knowing

Table View Settings

You can make several settings concerning the table view.



Name	Description
Table	**Choose the table you would like to define the settings for.**
Show Table... **for all Users** **for selected User roles** **for selected Users** **for all Teams** **for selected Teams**	**Who is authorized to see the table? You can choose whether you want to show your table to all users, only selected user groups, such as admins or managers, selected users, selected teams or all teams.**
Show Table on **Contact View** **Company View** **Group View**	**Where would you like the table to be displayed? In the contact and or company and or group view? Example: You choose, that the table shall only be shown in the company view. Only the records will be shown which are linked with this company.**
Tab Order on Contact View	**Choose the order of your individual tables in the**

Company View **Group View**	**different views.**
Show table on a common tab **Name of main tab**	**If you have several tables that you would like to show on one tab, you can select a tab for displaying this table on.**
Save settings for selected table	**Settings will be saved for the current table. You have a possibility to define the settings for other tables.**
Save and Close	**The settings for all of your edited tables will be applied and saved and you will get back to the main mask of Table IT.**
Cancel	**The settings won´t be applied and you will get back to the main mask of Table IT.**

See also

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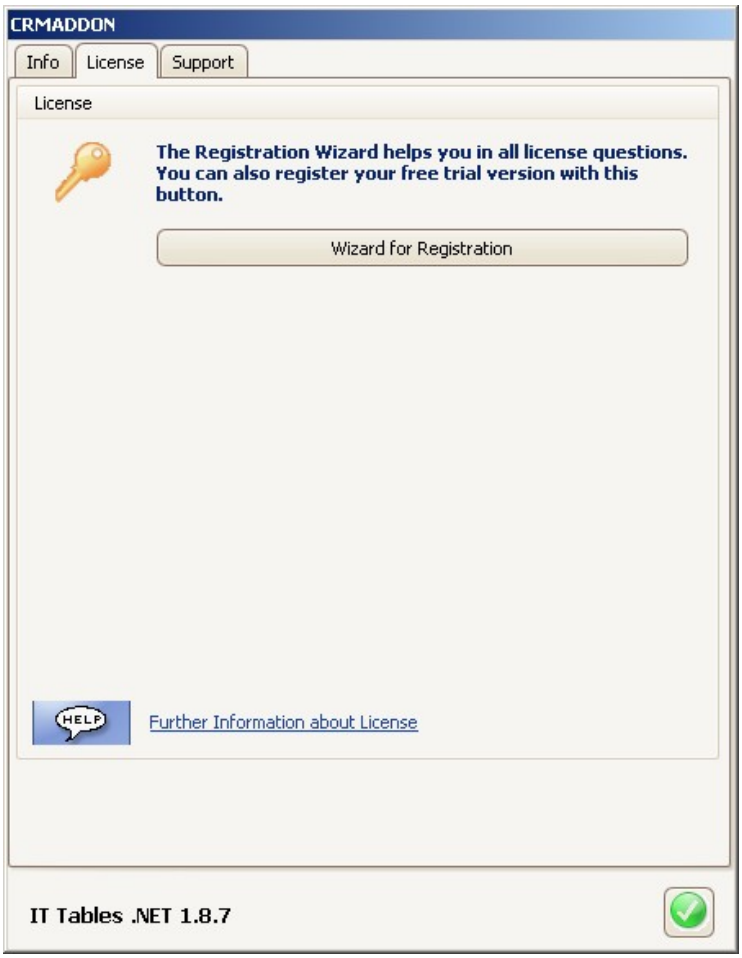
Configuration

Info

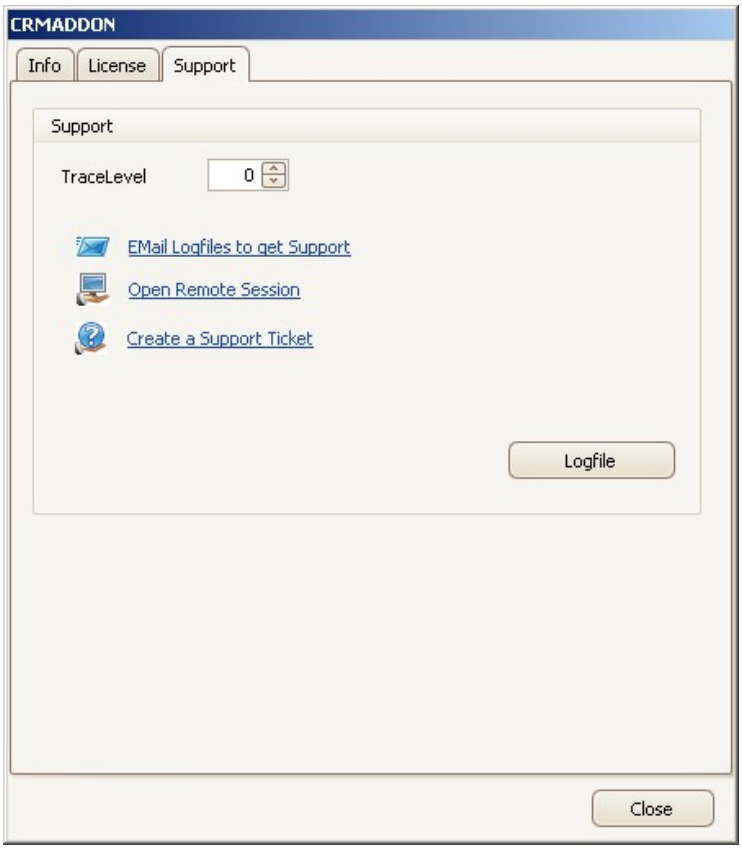
Link	Description
CRMADDON Factory GmbH	Link to our website.
Changelog	What has changed since your last installed version.
Download	Click here to download a .zip folder to update your BulkChange.IT.
Documentation	Download the manual.
Message Board	Click here to get to our forum where you can ask questions and discuss about our products.
Support	Create a support ticket if you experience any issues
IT Tables.NET 1.0.14	Shows the current version of the tool and where you saved the license file.

License



Register your Addon here. You need to click **'Wizard for Registration'** button to start the License Wizard

Support



On this tab you can create a support ticket for our team, open remote session if it was scheduled with our support representative and email log files to our support team for checking.
Log file contains information about the program errors, actions performed with it, etc. It will be helpful in issue solving.

See also

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View of the table in ACT!

There are no records in your new created table. You can add new details by a right click on the mouse and ***Add*** or if you click in the toolbar on ***Data*** => ***Add***

In this sample table all cars will be shown with Make, price, model, colour, miles,...

See also

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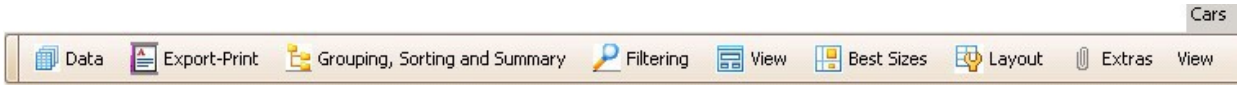
Worth Knowing

The Toolbar

You can find the toolbar below the several tabs of the new tables in ACT!.
But you can also get to the toolbar with your mouse right click.



On the following pages you will find more exact information about the functions of the toolbar.

See also

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Data

If you want to add a new row click ***Add*** button. A new row will be displayed where you can enter the data.

If you click ***Save*** all the changes will be saved.

If you click ***Delete*** all records will be deleted - there won´t be any record left in the table.

The following commands are only available if you created a subtable

Add Detail Record	A new detail record will be added.

Expand all Details	All detail records will be shown.
Collapse all Details	All detail records will be closed.
Show Detail Tabs	Tabulator for Details will be shown.
Joined Group Panel	The grouping will be shown in a panel.

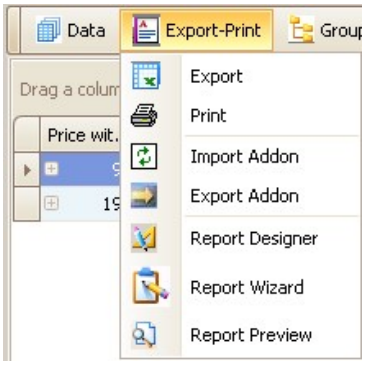
See also

Export-Print
Grouping
Sorting
Summary
Filtering
View
Best Sizes
Layout
Extras
View - Search

Home > The toolbar > Export-Print

Export-Print

Select an action from the Export-Print menu that you would like to perform with your Custom Table



Description

Exports the table into excel.

Prints the table.

Imports data into your table.

Exports data from your table.

Create a report.

Change the layout / design of your report.

Shows your existing report.

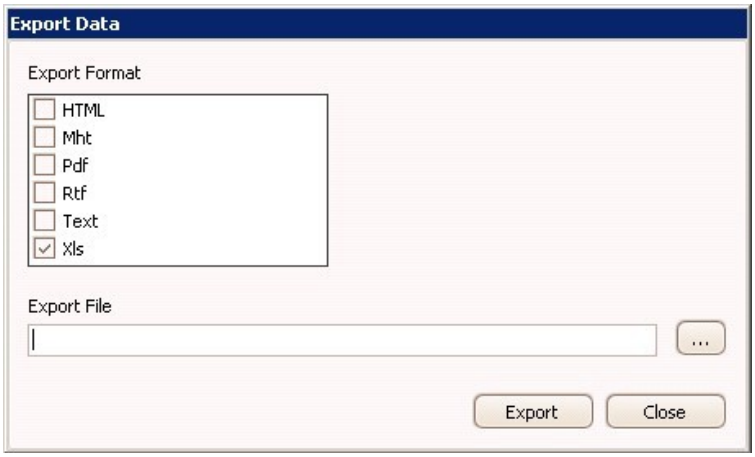
See also

Data
Grouping
Sorting
Summary
Filtering
View
Best Sizes
Layout
Extras
View - Search

Export

Export

Export your table into different formats. Therefore you only have to choose the export format and the directory where you want to save it and then click **Export**. If you changed your mind and you do not wish to export your table anymore, just click **Close** button.



You are able to export into the following formats:

- HTML
- Mht
- PDF
- Rtf
- Text
- Xls

If you would like to work with your table after exporting and then import it back with updates, we recommend using **Text** or **Xls** formats.

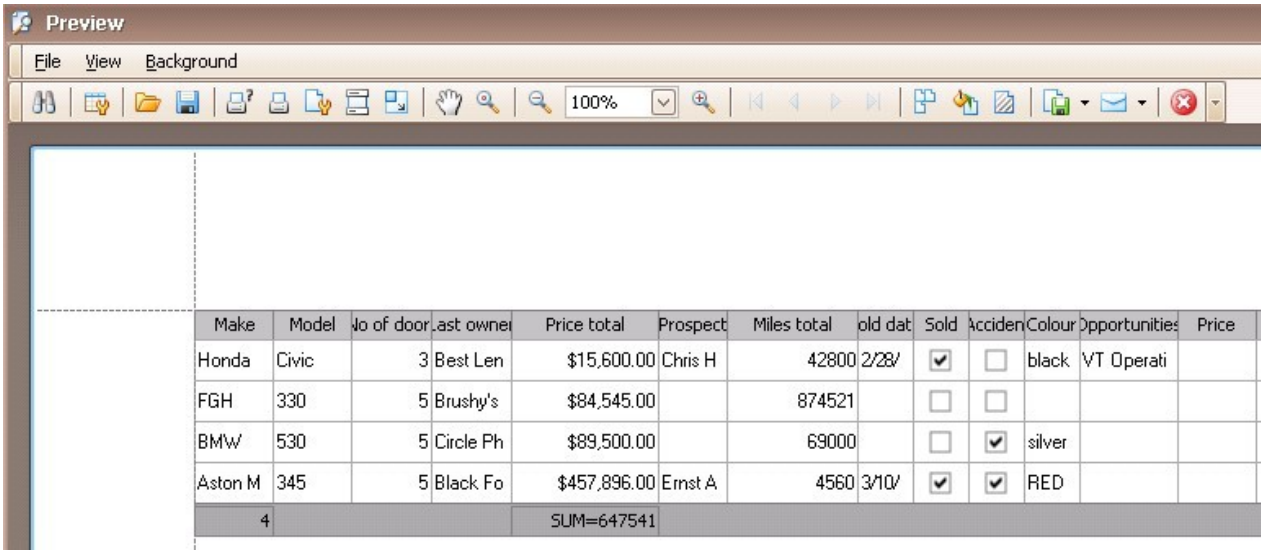
See also

Print
About the report designer

Home > The toolbar > Export-Print > Print

Print

If you click **Print** button a print review of your table will be shown:



There you have also a possibility to make updates before printing if necessary.

See also

Export
About the report designer

Home > About the report designer

CRMADDON's **Online Help**

Report Designer is a similar to ACT! report designer tool. It allows you to generate reports and create your own report templates. It is built in Table IT, Dial IT, Service IT and Scan IT addons. With Report Wizard you can create templates and send them by email to your contacts.

Report Wizard gives you an opportunity to create a report template, select which variables will be added to it. Report Designer will help you to add content to this template about your service making the report more user friendly.

Later those reports can be sent by email to your contacts and leads improving your sales and saving your time for creating follow ups for each particular case.

- Welcome
- Configuration
- Create a new Table
- Table View Settings
- Table Relations
- Calculation
- Tab 'Field Settings'
- Start the Table IT Application
- Tab 'Create Field'
- View of the table in ACT!

Report Wizard

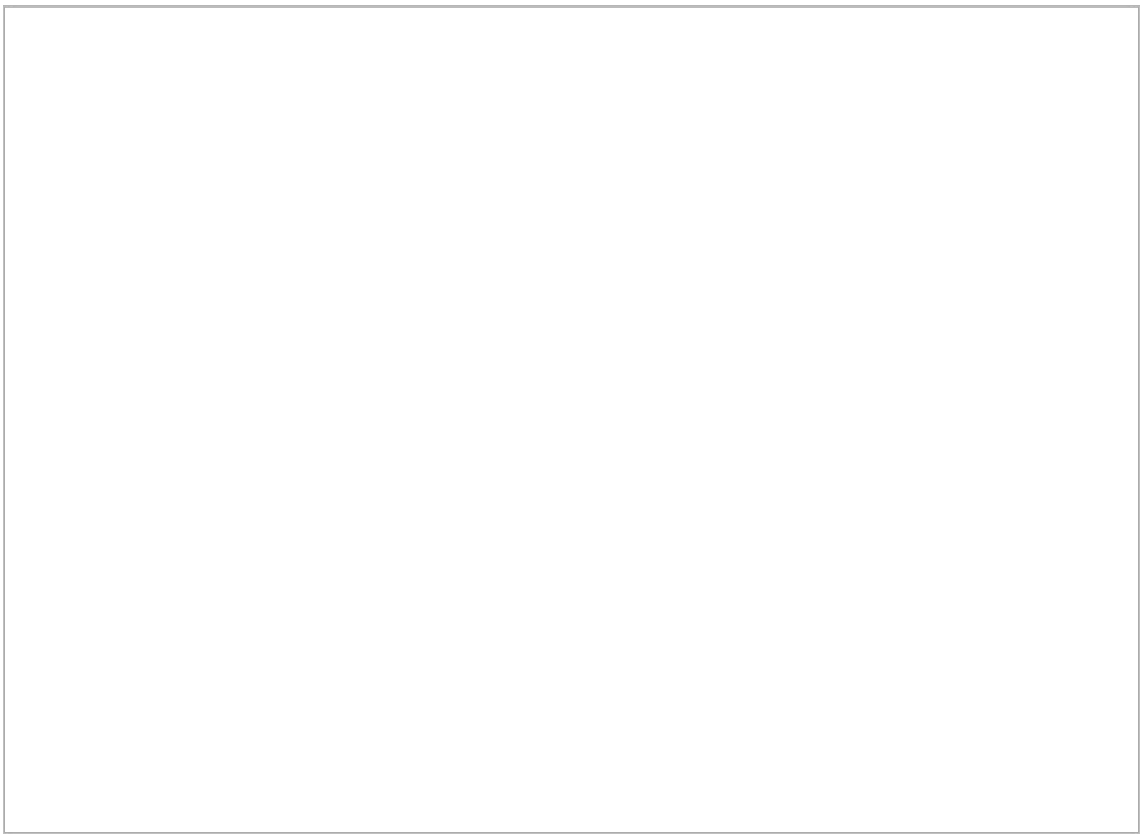
Standard Report

With Report Wizard you can create a report template, please click button to open your report wizard. This wizard will help you to select the information you would like to display in your report and set needed layout.

	Select whether you want to create a Standard Report or a Label Report. Then click on .
	Define the columns which shall be shown in your report. By clicking on the defined columns will be selected for your report, if you click on all columns will be selected for the report. Afterwards click on to get to the next step.
	If you want to group by specific columns you can define these columns here. Afterwards please click on .

	Define the layout of your report and click on .
	Define a style for the font and click on .
	Give your report a name and click on to end the wizard.

Then [Report Designer](#) will open:



See also:

Report Designer

Report Designer

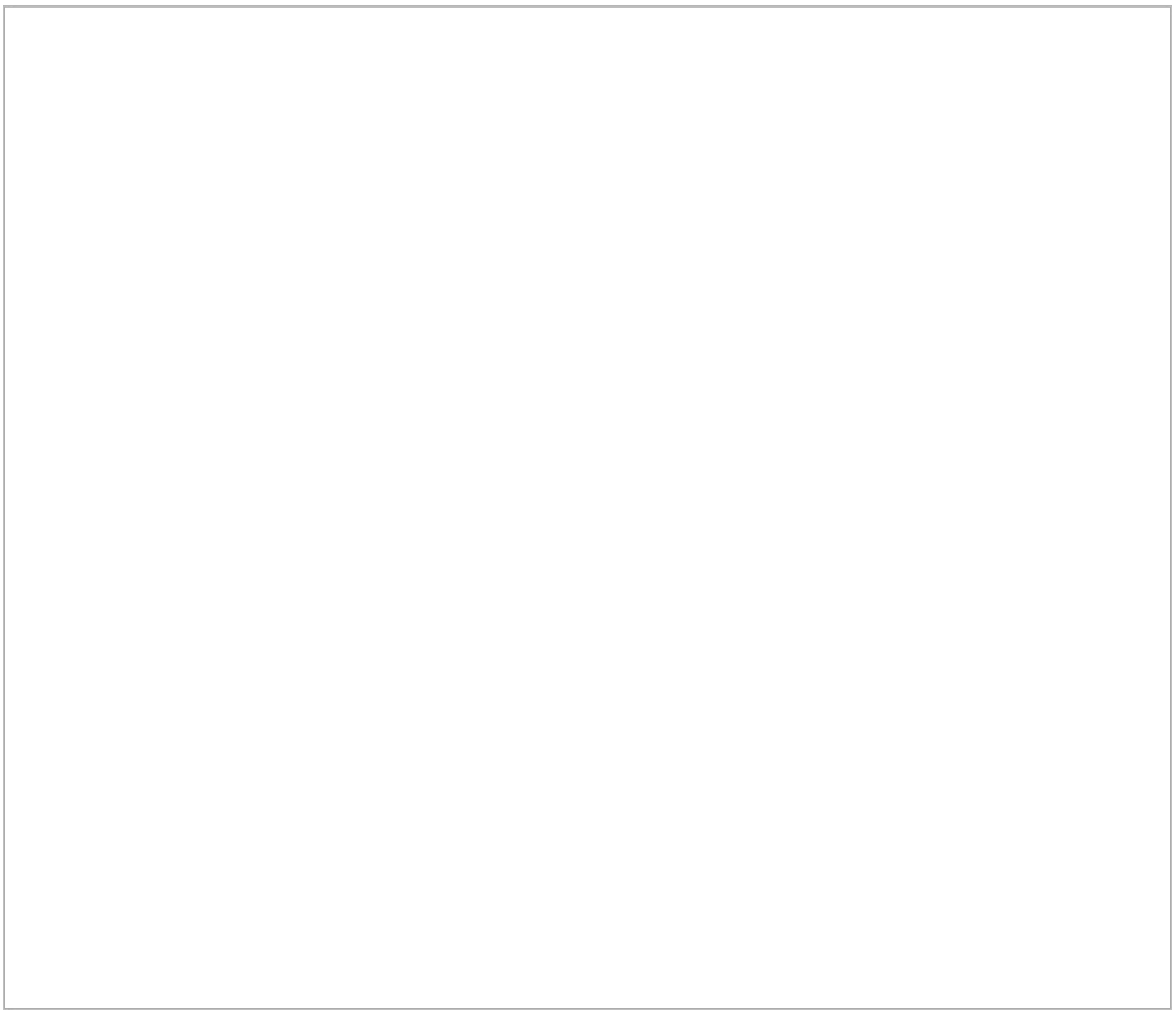
Report designer allows you to make needed design for your report template, add images, text, links, etc. After making a report template with Report Wizard you will need to use Report Designer to make it more user friendly. Simple template made with Report Wizard will contain only fields' details that were selected for the report. The Report Designer will help you to add there other content describing your services or the purpose of this report.

The following example shows how to create a report template with Report Designer tool.

1. Using Report Wizard choose **Standard Report.**
2.**Columns to display** in our report will be: Contact, Department, Title and Company.
3. Let's make Contact column to be as a **group level**.
4.In the next window we will choose Outline 1 as a **layout** and Landscape as **orientation**.
5.**Style** for our report will be Bold.
6.**The title** for our report will be "Dial IT professional".
If you change your mind about names of fields, slyles e.t.c., you can change them in Report Designer easily.As a result you will see this **window of report designer**. Callouts point to important areas.

You can **preview you report** by clicking HTML View or Preview icons.

Let's come back to our report designer by clicking on the **Designer button**.We will add our **template body** to the field right after the area with Company, Department and Title data. In our template the name of this fied is **"DetailBand1".**



Every template consists of different blocks with text, images, diagrams. All blocks in Report Designer may be easily **moved within template** from one place to another. With the help of your mouse you can change the **size of the blocks**. You can write text to the block and change font name, font size, font style, font color and alignment with the help of these icons in the top menu:
As a sample let's click on two Contact fields in DroupHeaderBand1 at the top of our template and move it down to DetailBand1. In the first field let's change the text from "Contact" to "Dear". Let's also make second field wider and change font style.

==>

If you click on any block in Report Designer to activate it, you will see this **small icon** **at the top right corner**. By clicking on this icon you will **open menu of the block**. The content of the menu depends on icon type. The main functions are:

1.Establish linkage between block and ACT! data. For example when you send one template to different ACT! contacts, Report Designer will put correct name of current contact, his contact details or history data.
2.You can **download data to the block** (e.g. picture or text in .rtf or .txt format).

As a sample let's change contact name "Chris Huffman" to Salutation, so the text will be "Dear Chris". For this you should press icon and choose Salutation in Data Binding field.

You can **create blocks** by selecting icons on Standard Controls panel (on the left) and moving them to the template body.
As a sample let's **create a text** for Dial IT Professional presentation. You can do it with the help of Lable icon or Rich Text icon.
You can write the text or paste it. You can take text from ACT! database or download a file.
Lable icon allows you to apply text formatting for the text. However you cannot edit the part of the text block because font style will be the same withing one block.
Rich Text icon allows you to put it's own font name, font size, font style, font color and alignment for every sentense or for every word. Here you can also download text in rtf or txt formats.
In our sample we need Rich Text icon. So we move it to the template with mouse and paste the text. For the first sentence we will choose different text style.

Then we may move our text block to the right side of the template and **download picture** to the left side.

IMPORTANT: To be sure that the images are visible on the customer's side please download all images to FTP server and use **Image URL** Links, e.g.: www.addons-for-act.de/Images/boxes/dialit.png

Usually you need to write the names of the pictures in small letters and without spaces:

Below the picture let's put **URL link** to Dial IT manual.

Finally our report is ready.

See also:

Report Wizard

Table_IT_US Administration

Any folders or pages added under =Admin= will only be visible in edit mode.

Reports

Page Summary

Activity Log

PDF Template

Report Designer

User Manual

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Table_IT_US

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Grouping

This feature is useful if you would like to create groups and sub groups from the data fields. You just need to move the fields to the Group Panel to group your data as shown on the image below:

Show Group Panel

A new row between toolbar and table columns will appear, there you can move columns to group.

In the following picture we moved the 'Make' and the 'Price total' into the Group Panel:

Show Group Footer Line

Footer line will be shown

Clear Grouping

If you would like to cancel made grouping. You need to select 'Clear Grouping' option and created grouping will be removed.

Group By

Choose whether you would like to group by month, year, date, date range, default:

See also

Data
Export-Print
Sorting
Summary
Filtering
View
Best Sizes
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View - Search

Home > The toolbar > Sorting

Sorting

Sorting

Sorting option allows selecting sorting rule for the data:

You can set your data to be sorted in Ascending, Descending order or disable sorting rules for your data.
You can also sort data in columns by clicking the following arrows:

Ascending sorting

Descending sorting

See also

Data
Export-Print
Grouping
Summary
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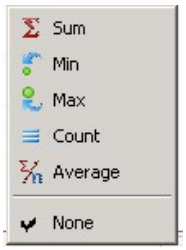
View - Search

Home > The toolbar > Summary

Summary

If you make a right click of the mouse in the footer, you will have a possibility of building sums.



All Values of this column will be summed up to build the sum.

The Minimum of this column will be created.

The Maximum of this column will be created.

The amount of all records of this column will be shown.

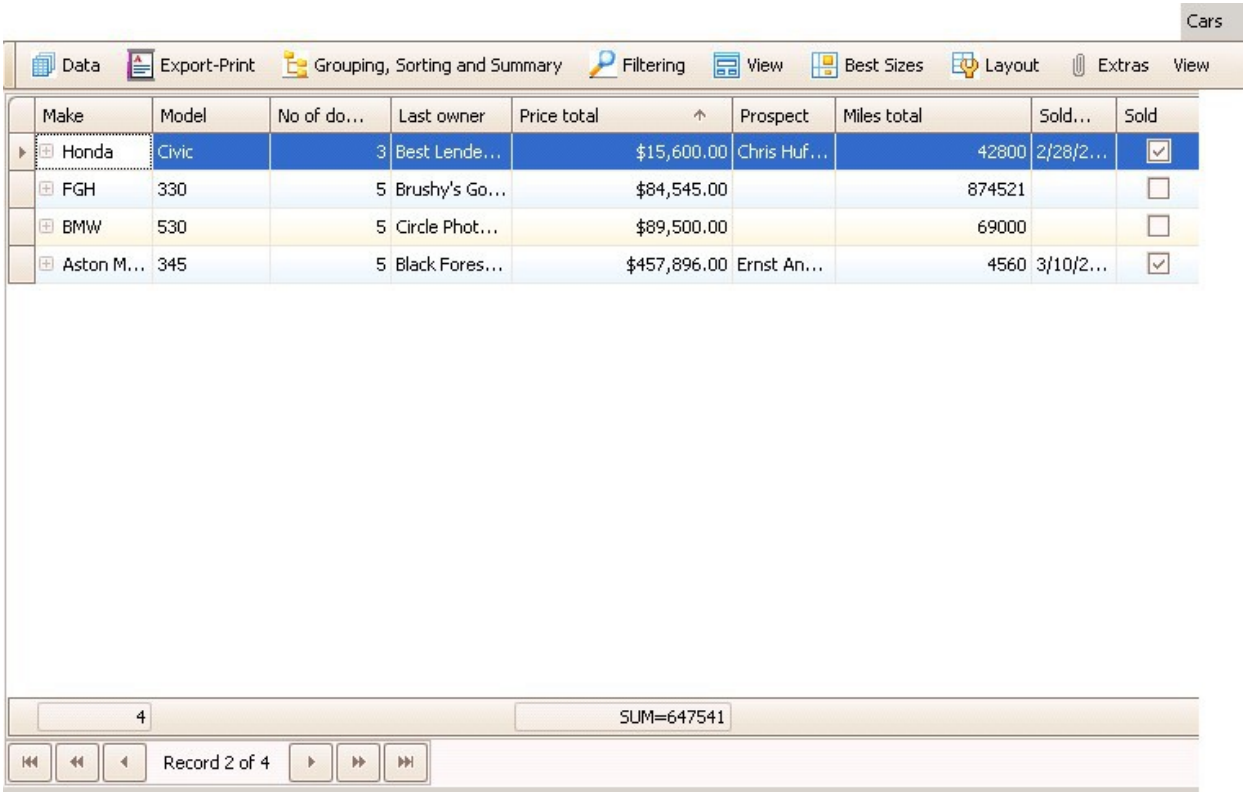
The average of this column will be built.

No calculation will occur.

Please note! You should right click under the column you would like to execute a command for.

Example:

Sum of the prices - right click under the column 'Price total' and select 'Sum' option from the context menu.



=> coming soon!

See also

Data
Export-Print

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Filtering

On the following pages you can learn how to use the search filter feature.

See also

Data
Export-Print
Grouping
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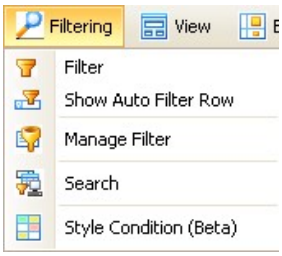
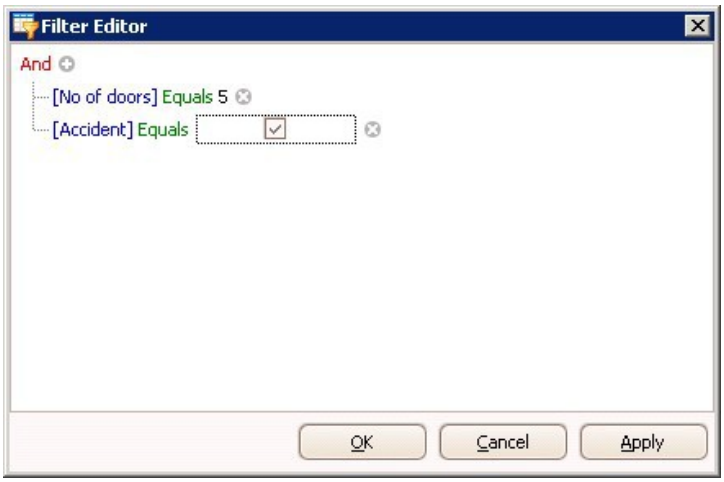
Filter Editor

Filter editor is a tool that helps to filter certain records in your Custom Table. You can set here needed criteria for the elements you would like to filter. Such elements will be filtered and appear in the table, when other elements will be hidden.

You can open Filter Editor from the 'Filter' menu item:





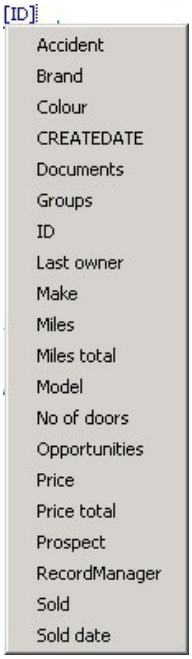
By using the filter function you can filter needed records in 4 steps.

Step 1:

Choose the criteria. If you click ***And*** a list will open up where you can choose out of several criterias.

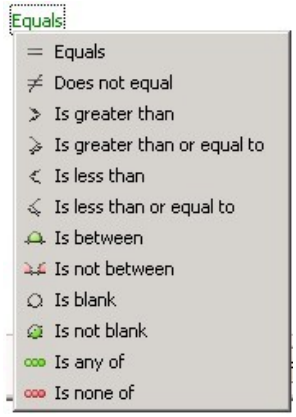
Step 2:

Click ***ID*** and a list with all existing columns of the table will appear. Choose the column you would like to search in.



Step 3:

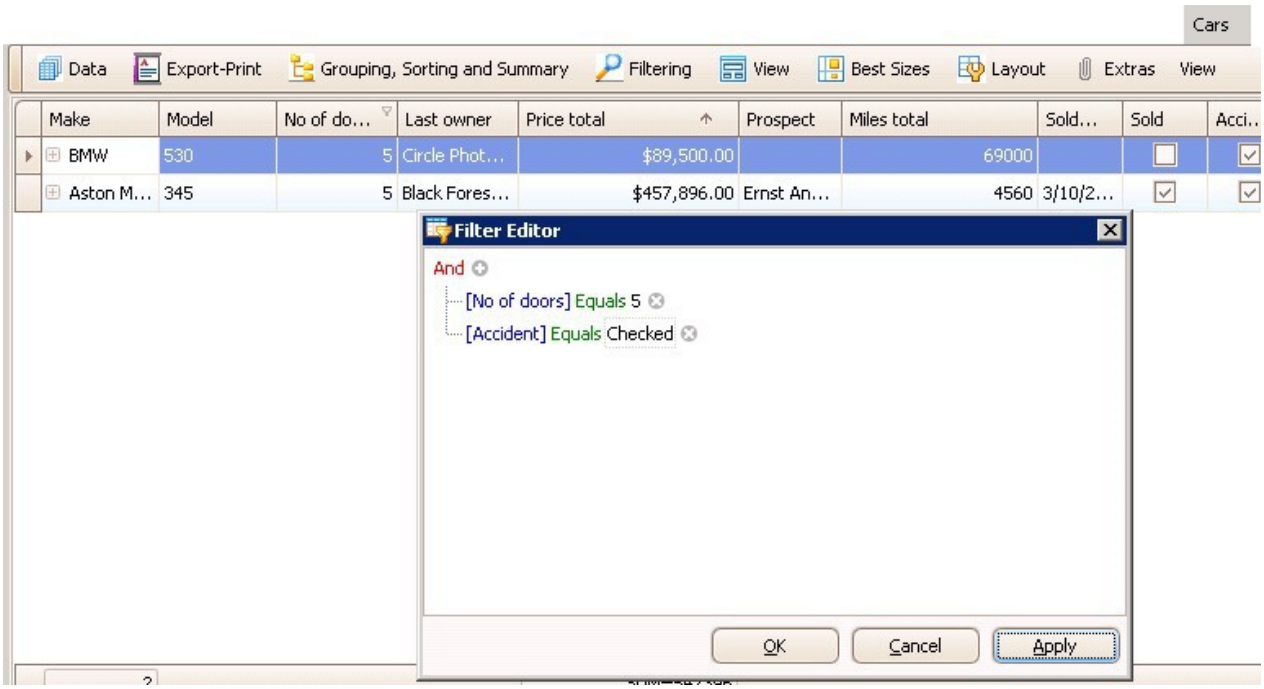
Click ***Equals*** and a list will open in which you can choose how the criteria should look like.



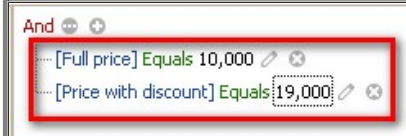
Step 4:

Click ***enter a value*** and you can enter the value you would like to search for.

Your search result will be shown like here:



The records identified in Filtering window will appear in the table.

Function	Description
	Logical operator combining conditions. Click to change the current operator, add/remove conditions and group of cinditions
	Filter conditions combined in a group
	Click this button to remove a condition
	Click here to select another column on your Custom Table
	Criteria operator. Click here to change current operator

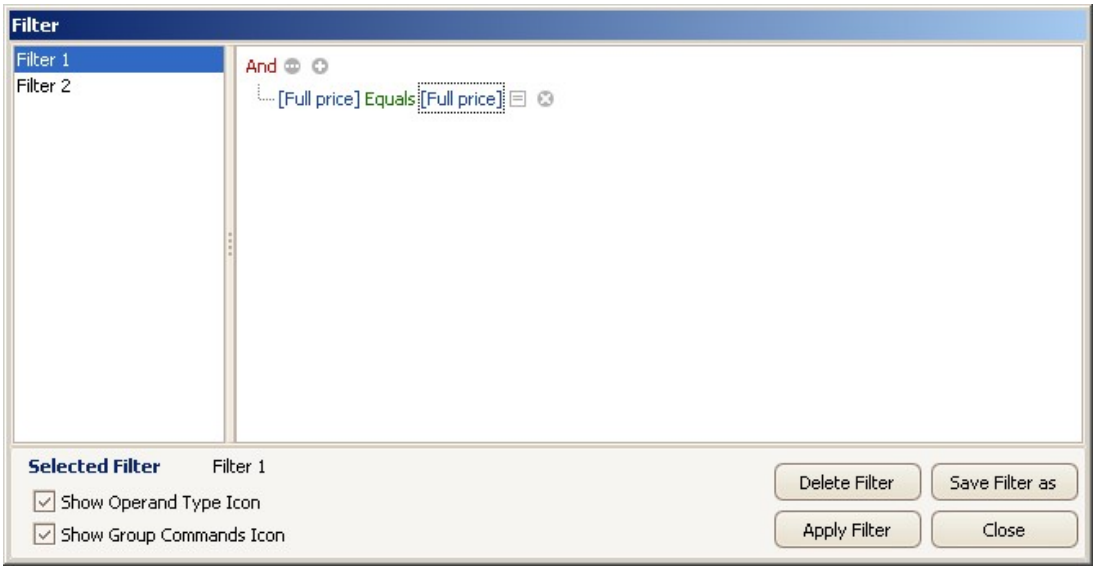
[Full price] Equals 10,000	Operand value. Click here to specify a value

See also

Manage Filter
Search
Stylecondition (Beta)

Manage Filter

Filter manager feature allows creating and saving different filters for your Custom Table. You can open this manager, select any of the created filters and apply it.



Function	Description
Filter1 Filter2	The name of your filter
And [Full price] Equals 10,000	Filter editor
Show Operand Type Icon	And [Full price] Equals 10,000 the following icon will be shown in the Editor window
Show Group Commands Icon	And [Full price] Equals 10,000 the following icon will be shown in the Editor window It allows selecting commands from the following list: Add Condition Add Group Clear All

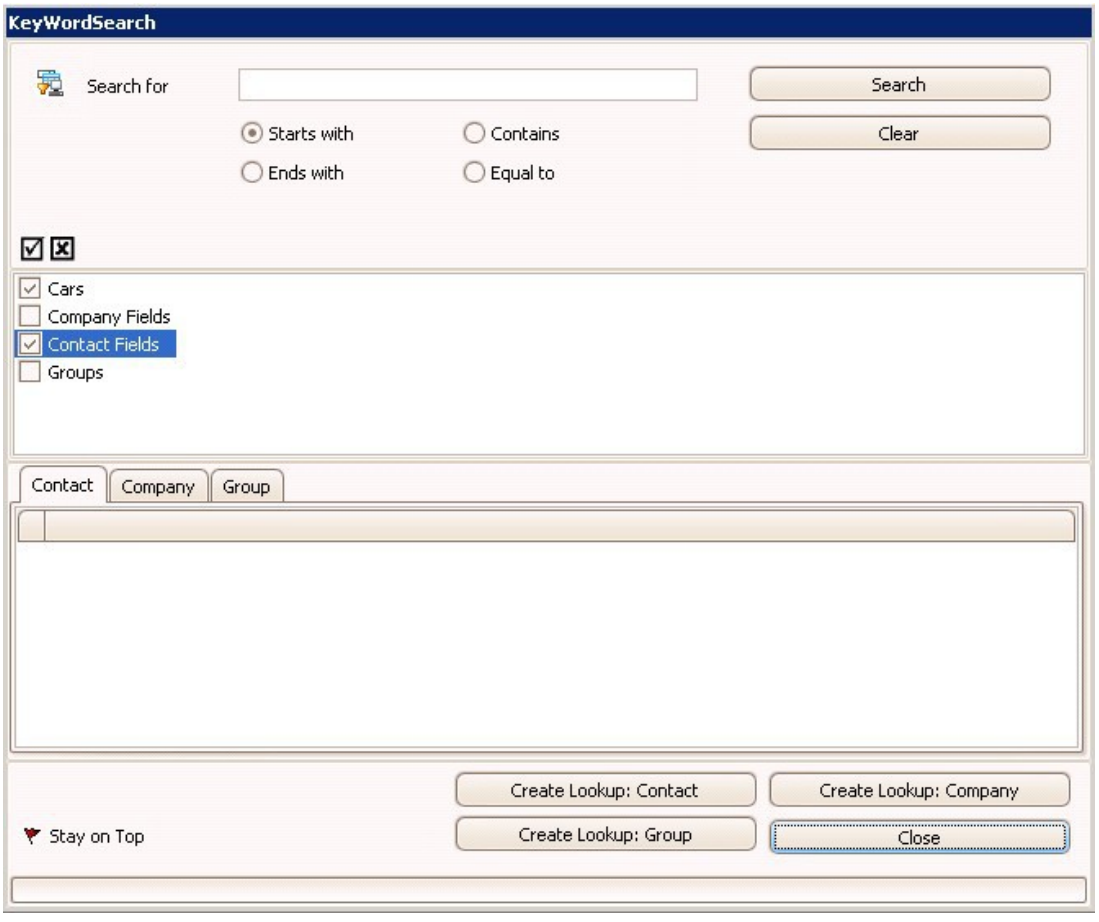
Delete Filter	Remove filter by clicking on this button
Save Filter as	Save filter by clicking on this button
Apply Filter	Apply the selected filter by clicking on this button
Close	Close Filter Manager window

See also

Filter Editor
Search
Stylecondition (Beta)

Search

Use Search option for searching needed elements in your ACT! database records.



Name	Description
Search for	Enter the search item or a part of the search item, e.g. the initials.
Starts with Contains Ends with Equal to	Choose whether the results should start or end with the before defined information, or whether it should contain or be equal to this information.

☐ Cars ☐ Company fields ☐ Contact fields ☐ Groups	Define the search area. Additional to the company-, group- and contact fields the individual tables will be shown as well.
Search	The search will be run and the results will be previewed here.
Clear	Search settings will be deleted.
FullName / Company / RecordManager / RecordCreator Chris Huffman / / Chris Huffman / ACTI System	The search results will be shown here at first.
Create Lookup: Contact/Group/Company	Should the result be shown as contact, group or company?
Close	Close the search process.
Stay on Top	The window stays at the top of all other applications.

See also

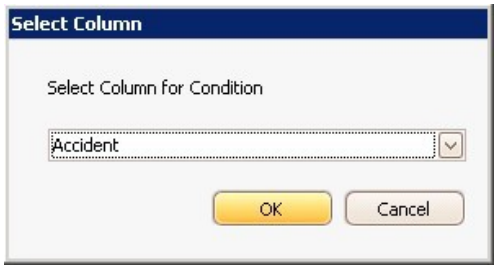
Filter Editor
Manage Filter
Stylecondition (Beta)

Stylecondition (Beta)

Form the design of your table here

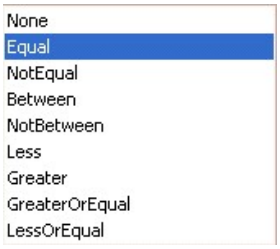
Just follow these instructions:

1. Choose the column you want to colour



2. Click on Add New Style Conditi

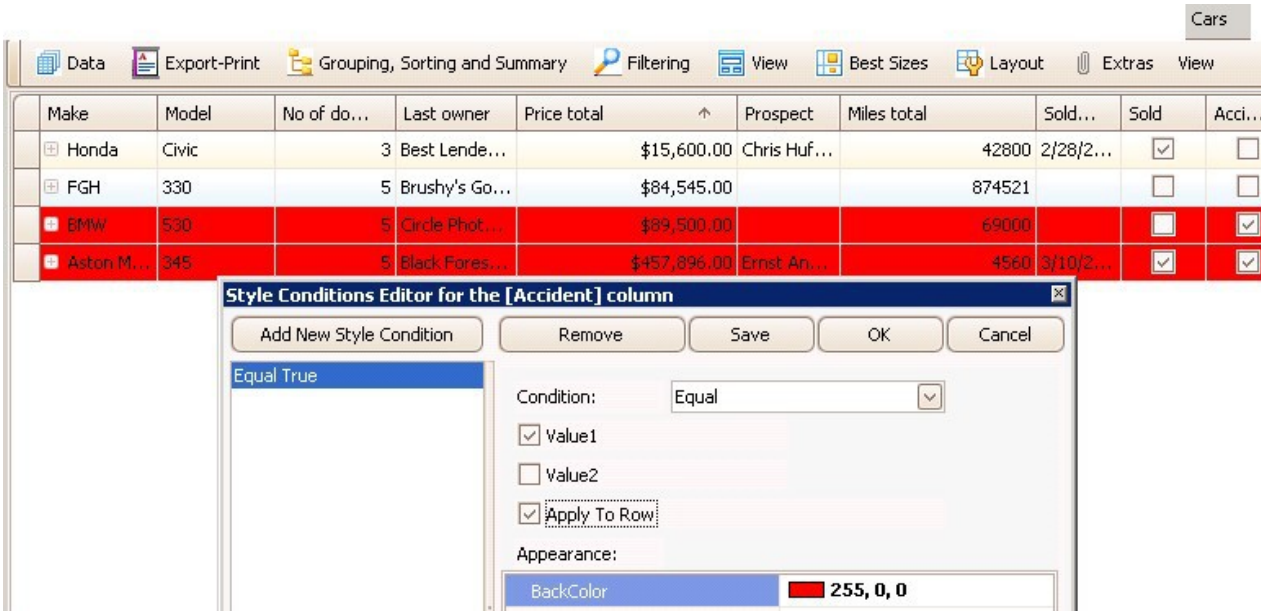
3. Choose one of the following conditions:



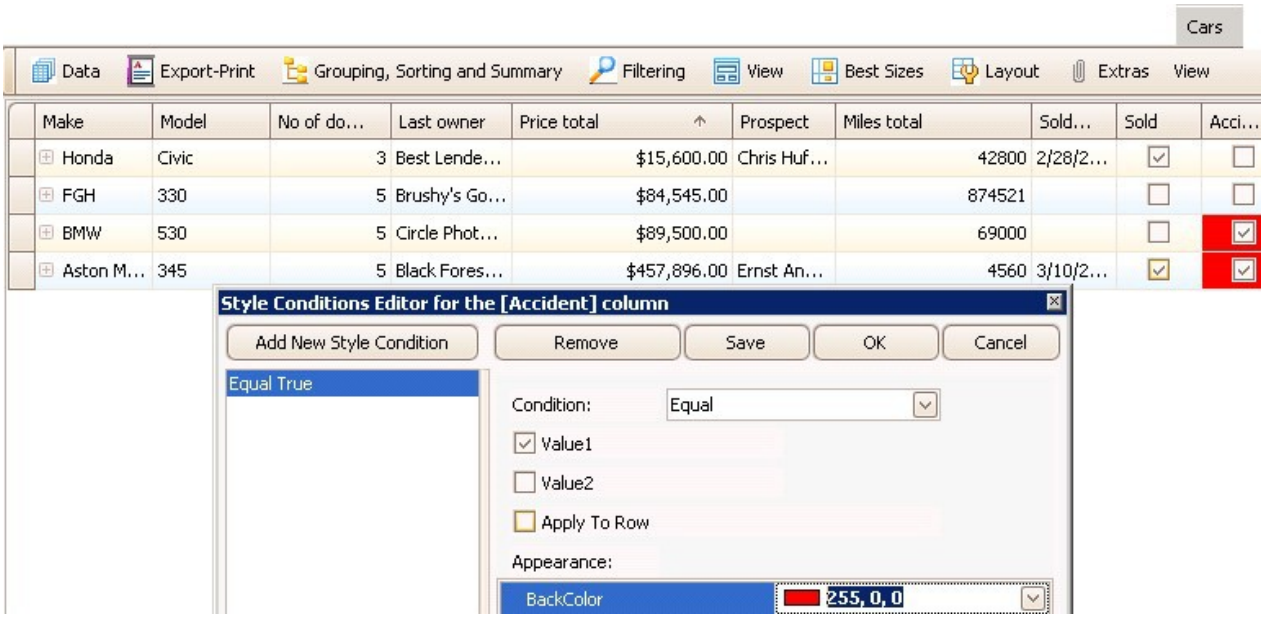
4. Enter a value and choose a colour which you want to use for the accentuation.

5. Click on ***Save*** and ***Ok*** to inherit your settings.

6. If you want to colour the whole row in which this value appears, activate the ***Apply to Row.***



If you do not activate this function, only the value of the chosen column will be coloured.

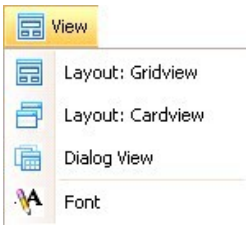


See also

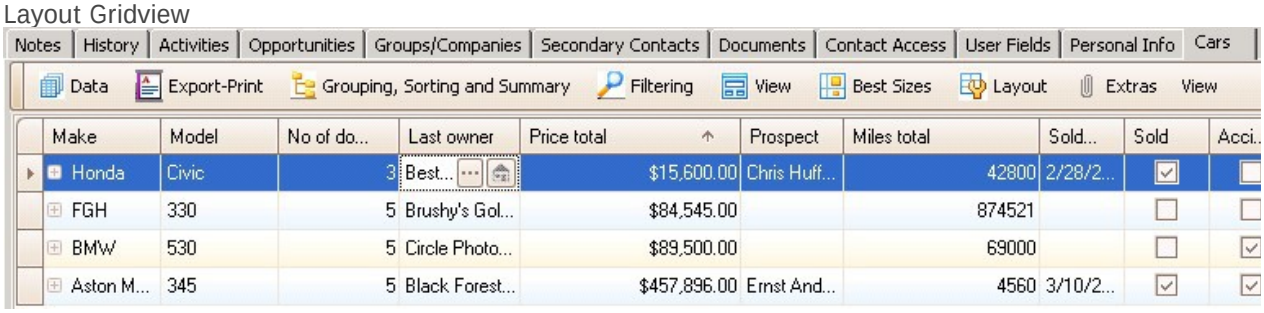
Filter Editor
Manage Filter
Search

View

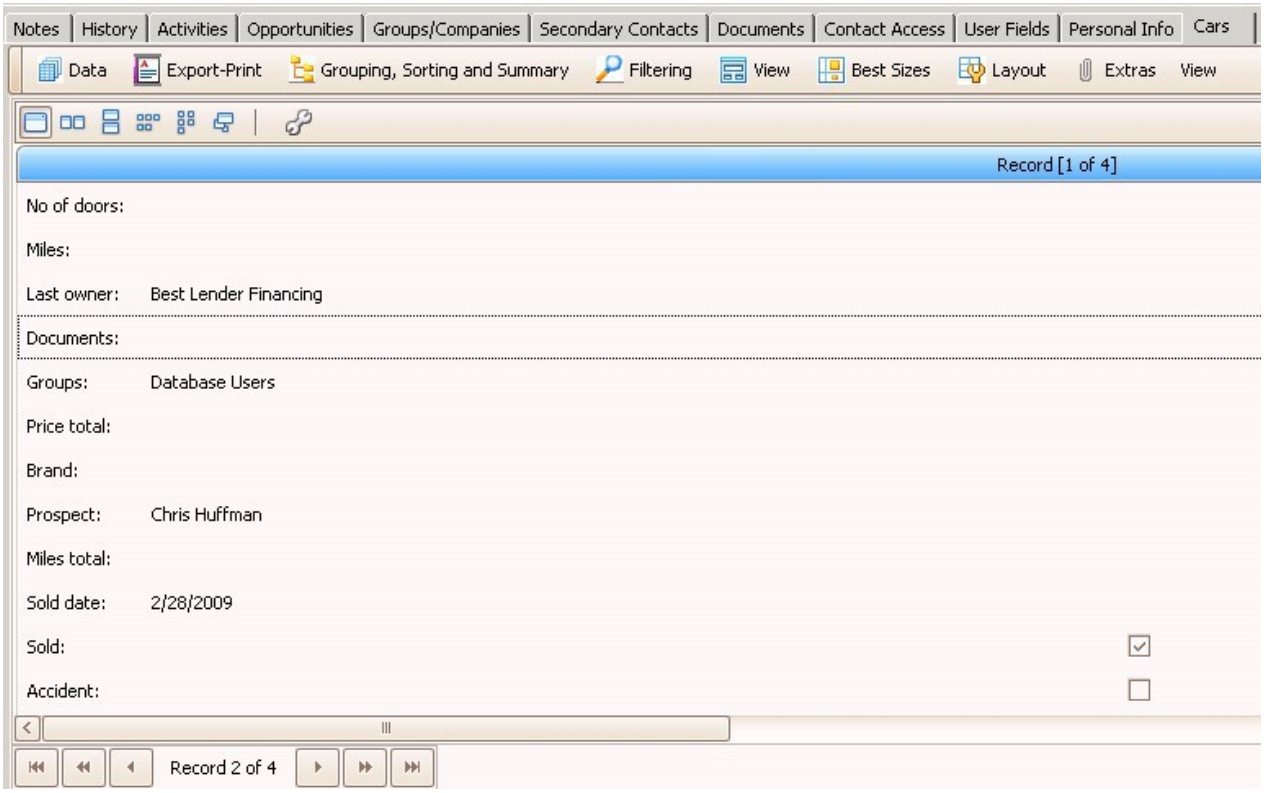
In this menu you can select different view modes. Your table content will be displayed depending on the selected view mode



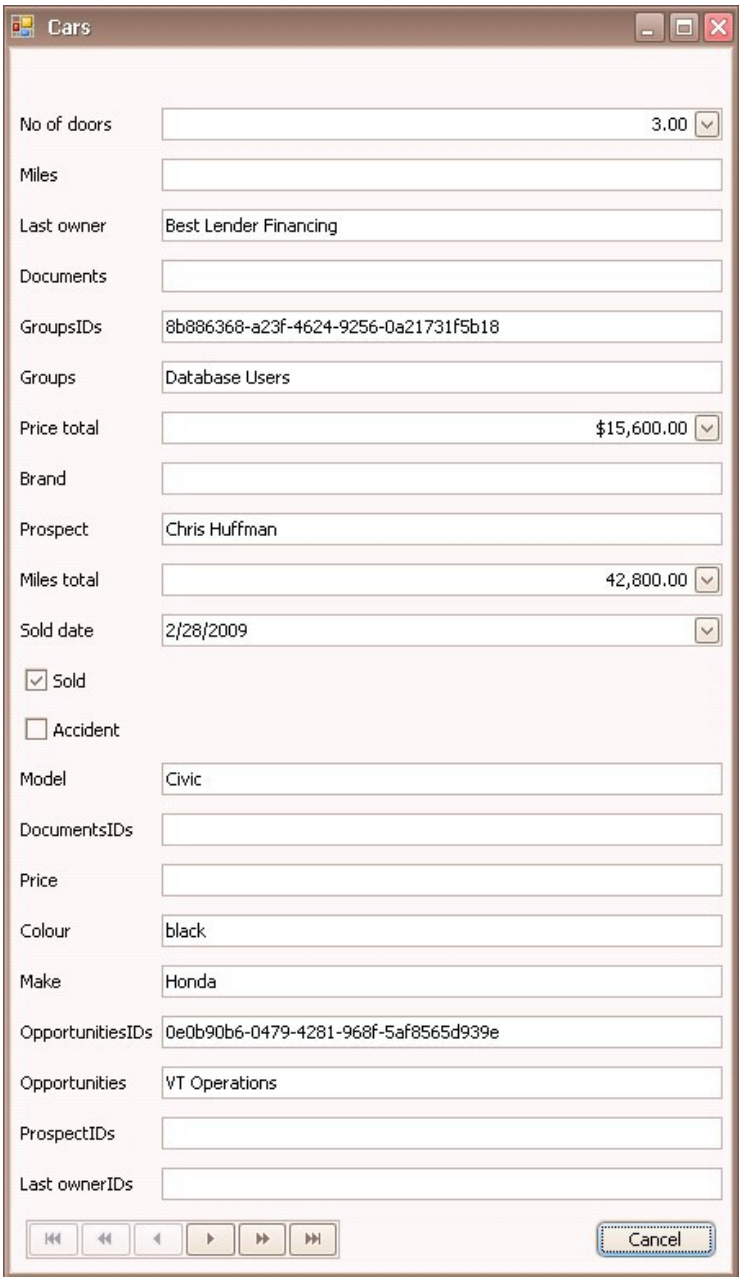
Layout Gridview



Layout Cardview

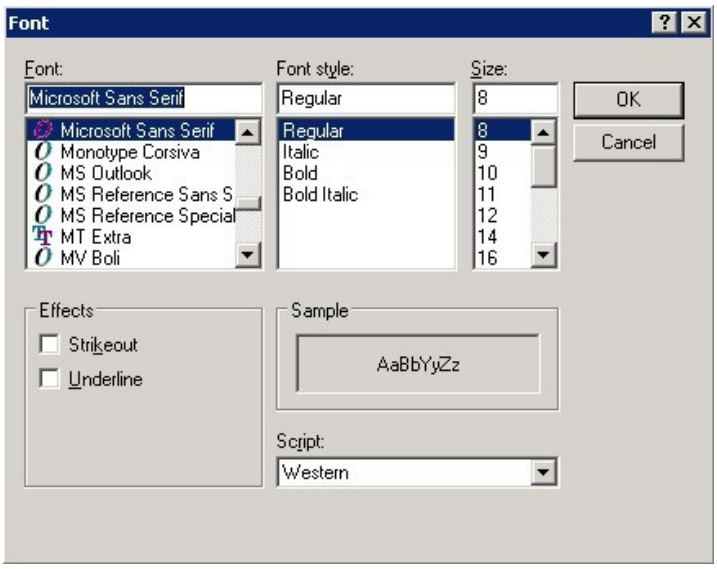

Notes
History
Activities
Opportunities
Groups/Companies
Secondary Contacts
Documents
Contact Access
User Fields
Personal Info
Cars
Data
Export-Print
Grouping, Sorting and Summary
Filtering
View
Best Sizes
Layout
Extras
View
Record [1 of 4]
No of doors:
Miles:
Last owner: Best Lender Financing
Documents:
Groups: Database Users
Price total:
Brand:
Prospect: Chris Huffman
Miles total:
Sold date: 2/28/2009
Sold:
Accident:
Record 2 of 4

Dialog View



Font

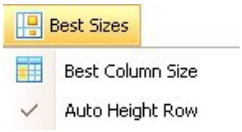
In the 'Font' menu define the font, font style and size, effects and the script of the table.



See also

Data
Export-Print
Grouping
Sorting
Summary
Filtering
Best Sizes
Layout
Extras
View - Search

Best Sizes



The size of the column will be customized to fully show all contents of the columns and rows.

The height of the row will be automatically customized if this function is activated.

See also

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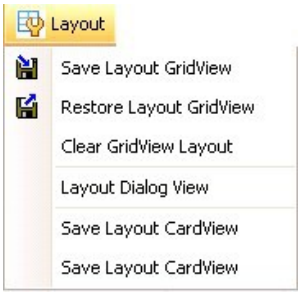
Layout



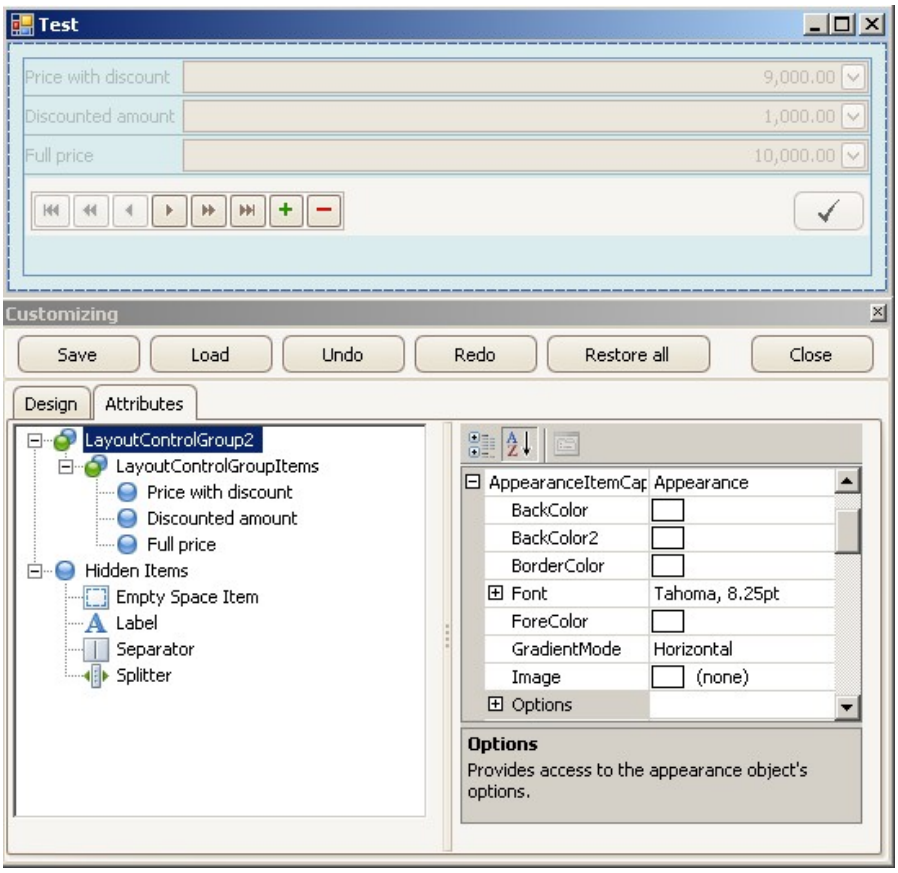
Saves the order of the columns
Columns will be shown in the last order
Layout will be reset.

See also

Data
Export-Print
Grouping
Sorting
Summary
Filtering
View
Best Sizes
Extras
View - Search

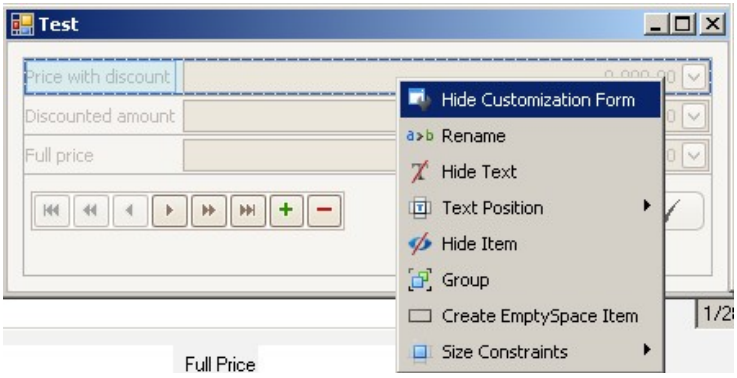
Layout Dialog

Layout dialog allows you to customize your Custom Table layout design:



You can modify the current layout using drag-and-drop and resizing operations and commands provided by context menus.

Context menus that can be invoked by right-clicking within the Layout Editor provide various customization commands. Different commands are available depending upon the type of a layout item which has been right-clicked (a regular control, a group or tabbed group):



For example you can hide an element, rename it or change its position.

After performing all needed changes you need to save them by clicking **'Save'** button and exit the 'Customizing' window with **'Close'** button.

See also

Extras

You will get back to the main mask of Table IT.

All records will be deleted irrevocably.

See also

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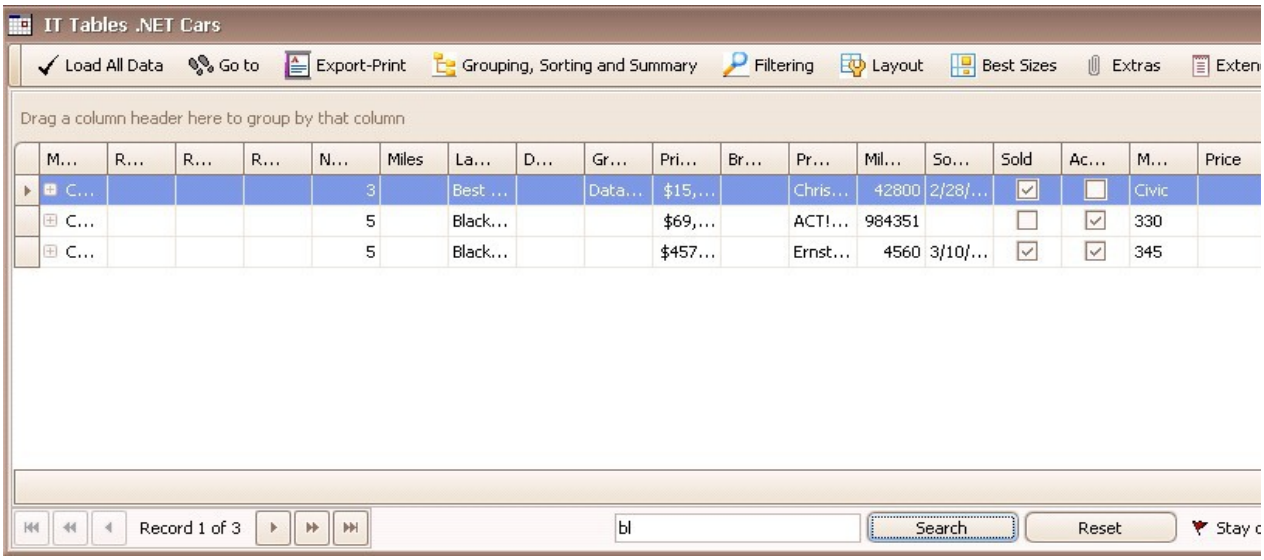
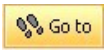
View-Search

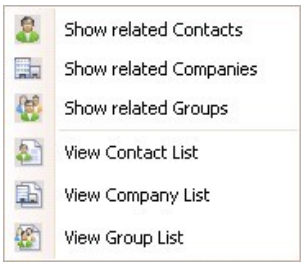
This mode allows you to view your Custom Table in a separate window and perform search in it.



If you enter a search item under GridView Lookup Engine and click Search button, the results will be shown.

If you click then 

, you will be able able to specify how the records should be shown.



Only the related contact/group/company of the current record will be shown.

The whole contacts/companies/groups will be shown as contact-, group- or company list.

There will only be shown a search result, if there really exists a related company/group/contact.

See also

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Filtering
View
Best Sizes
Layout
Extras

Home > Worth Knowing

Worth Knowing

ACT! Bug: Delete Custom Table Records in Non-US Regions

Knowledgebase

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Show on Masterrecord
About the report designer
Calculation
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The toolbar

Home > Worth Knowing > ACT! Bug: Delete Custom Table Records in Non-US Regions

ACT! Bug: Delete Custom table Records in Non-US Regions

ACT! Bug: Delete Custom Table Records in Non-US Regions

With some of the ACT! Versions you are not able to delete custom table records if your date settings are in a Non-US-Format. This bug is confirmed by Sage and will be fixed with an update for ACT! 2009.

Workaround: Set your Windows Regional Settings to use US-Style-Format for Date.

To do this: Open the Control Panel - then the Regional and Language Options

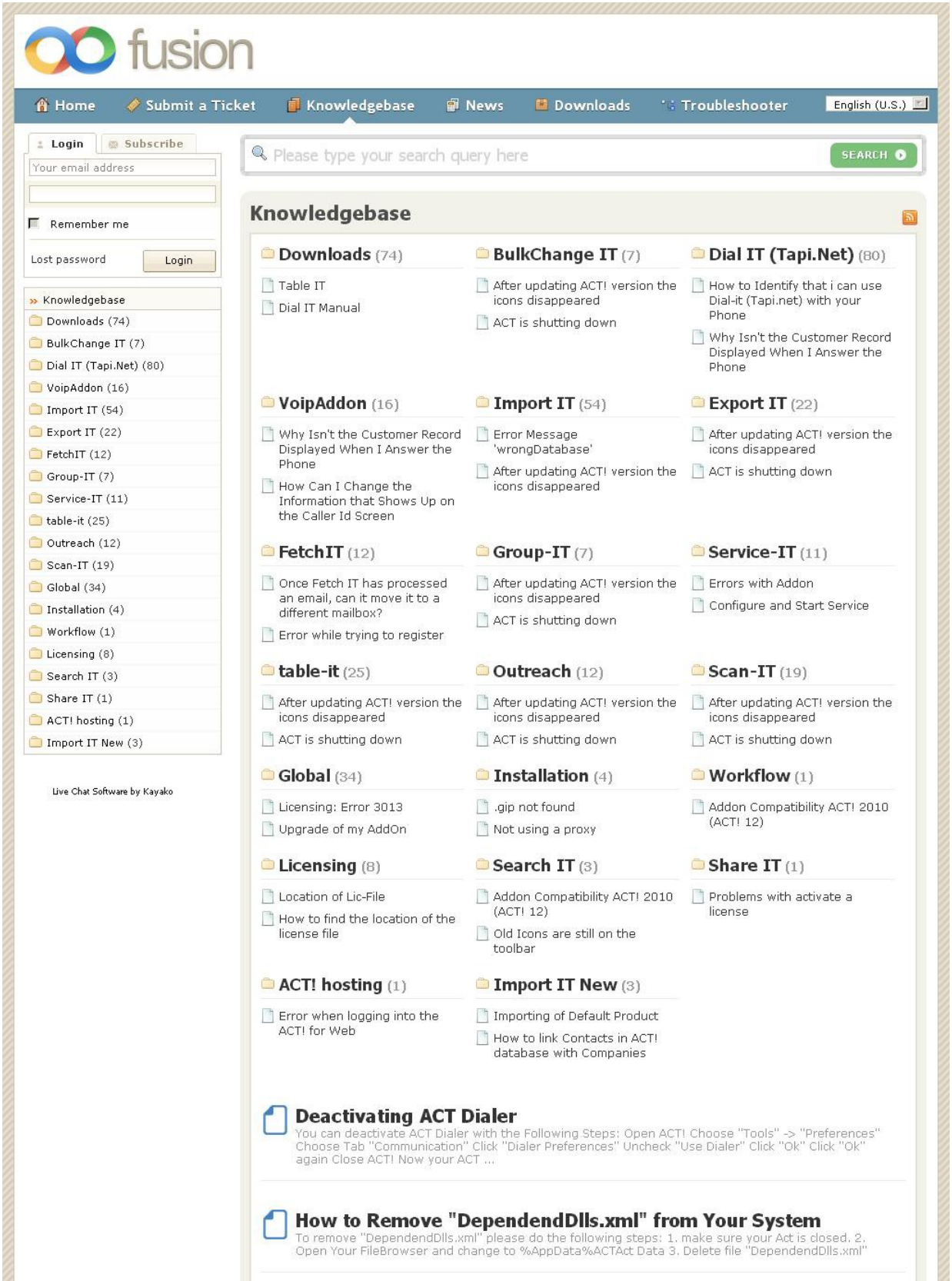
The following two options (we found) work the best - give it a try:

(1) US style: MM/DD/YYYY
(2) Modified Non-US Format like DD.MMM.YYYY

After you have done these changes, please restart your system. Then you will be able to delete custom table records in ACT!.

See also

Knowledgebase


fusion
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Knowledgebase
News
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English (U.S.)
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Subscribe
Your email address
Remember me
Lost password
Login
Please type your search query here
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Not using a proxy
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Importing of Default Product
How to link Contacts in ACT! database with Companies
Deactivating ACT Dialer
You can deactivate ACT Dialer with the Following Steps: Open ACT! Choose "Tools" -> "Preferences" Choose Tab "Communication" Click "Dialer Preferences" Uncheck "Use Dialer" Click "Ok" Click "Ok" again Close ACT! Now your ACT ...
How to Remove "DependendDlls.xml" from Your System
To remove "DependendDlls.xml" please do the following steps: 1. make sure your Act is closed. 2. Open Your FileBrowser and change to %AppData%ACTAct Data 3. Delete file "DependendDlls.xml"

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8. Problems with activate a license

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8. Possible solutions for integrating Dial IT with your phone system.

Help Desk Software by Kayako Fusion

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